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Canadian Radio-television and
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Conseil de la radiodiffusion et des
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Special Report on Broadcasting in Canada 1968-1978

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Volume 1

SPECIAL REPORT ON BROADCASTING IN CANADA

1968-1978

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SPECIAL REPORT ON BROADCASTING IN CANADA

1968-1978

FOREWORD

The Broadcasting Act, which created the Canadian Radio Television Commission (CRTC),* came into force, by proclamation, on 1 April 1968. The Act provided for a number of changes in the regulation of the Canadian broadcasting system. For the first time, a socio-cultural responsibility was imputed to all elements of Canadian broadcasting, including the private sector. During the 10 years since the proclamation of the Act, there have been important developments in broadcasting in Canada, on which the rapid expansion of cable television has had a profound impact. It is therefore timely to report on those developments with regard to coverage, audience patterns, ownership, and economic state, and to draw conclusions that may serve as a foundation for future policy.

This report is based on detailed statistics prepared by the research staff of the CRTC from all the available sources; they present, generally, the figures for the years 1967 and 1977, although in some cases comparative figures are given for the mid-year 1972, and in others for all the years in this period. Coverage statistics relate to the availability to the Canadian public of Canadian (public and private) and foreign television and radio stations. The statistics on audience patterns are related to category and source (Canadian or foreign) of program, and to the preferences of Canadian audiences for Canadian and foreign broadcasting stations; these figures are also broken down by the language of programming. Further, both coverage and audience patterns are analyzed in relation to the geography and demography of Canada. The result of this research is a formidable mass of tables and figures, which is summarized here. A second volume, which incorporates most available data, is published as a supplement.

Another important reason for producing this report is that further radical changes in broadcasting are imminent because of technological developments that are now reaching, or have already reached, the stage of practical implementation. Communications satellites have been valuable in

* Now the Canadian Radio-television and Telecommunications Commission (CRTC).

extending CBC television coverage in Canada, and direct broadcasting from satellite to home, long promised, will almost certainly be feasible within a few years. Coaxial cable can carry visual and other information of all kinds, including television and radio signals, and cable television undertakings are already providing some other services, a trend that is likely to prove irresistible. In short, a new era in communications is at hand, and this fact cannot be ignored in devising future broadcasting policy for Canada. It is believed that the factual conclusions drawn in this report from the analysis of experience during the past 10 years should be a valuable reference for devising national policy.

I. INTRODUCTION

A. HISTORICAL BACKGROUND*

The feasibility of radiocommunications over long distances was demonstrated by Marconi in 1901 by the transmission of Morse signals across the Atlantic, but it was some years before voice transmission was introduced. It was not until after the First World War that broadcasting, that is to say the transmission of signals intended for reception by the general public, emerged. The Montréal English-language radio station XWA (now CFCF), which began transmission in 1919, started as a device to promote the sale of Marconi products. The first commercial radio station was licensed in 1922, and in the following decade stations proliferated across Canada, which were owned and operated by a wide range of dissimilar groups and corporations; in effect, but for stations owned by the Manitoba Government and Canadian National Railways, radio broadcasting was left entirely to the private sector.

Following the recommendations of the Aird Commission of 1928-29, and as a result of widespread and influential pressure from people in all walks of life, it was decided to establish a public broadcasting system, and the Canadian Radio Broadcasting Commission came into operation in January 1933. Despite some noteworthy achievements, the Commission was handicapped by lack of funds and experienced other difficulties; by 1936, when the Commission was replaced by the Canadian Broadcasting Corporation (CBC), the national network still only reached less than half the population.

Television emerged, at least for practical purposes, in the late 1940s, and in the early 1950s the CBC was operating its own television stations in a few major centres. While a few private CBC affiliates existed in this period, the field was further opened to the private sector in 1958 when private stations not affiliated to the CBC were allowed, and the CBC was enabled to extend its national coverage by the use of affiliated private stations, as it had done in radio broadcasting. For this reason, it has never been possible to draw a precise dividing line between the public and private sectors; in 1965, for instance, more than half the private television stations were affiliated to the CBC networks.

* No attempt is made here to detail every step in the development of Canadian broadcasting up to 1967, for which ample sources are available. See for example E.A. Weir, The Struggle For National Broadcasting in Canada (Toronto: McClelland and Stewart, 1965).

Community-antenna television (CATV) systems began to appear from about 1952; their original purpose was only to bring television signals to places that, for one reason or another, could not receive direct transmissions from any source at all. Within two or three years, however, a market for CATV developed in places already served by Canadian stations, partly because of improved quality but, more importantly, because it gave access to stations in the United States that could not otherwise be received. The impact of cable television developed inexorably through the decade under review in this report.

B. REGULATORY BACKGROUND

The Government of Canada had moved into the regulation of radiocommunication in 1905, and began to license commercial radio stations in 1922. All broadcasting licences remained, until 31 March 1968, no more than special-purpose radio licences, and were issued by the Minister of Transport under the Radio Act. The Board of Governors of the CBC, from its inception until the Broadcasting Act of 1958 came into force, was the regulatory body for the private sector (as well as being responsible for the operations of the CBC itself). This authority was transferred in 1958 to the newly created Board of Broadcast Governors (BBG); moreover, the Act provided that the Minister, before issuing a license to "establish a broadcasting station" under the Radio Act, must refer the application to the BBG for its recommendations, and that no such licence be issued without the approval of the Governor in Council.

The 1958 Act made no provision for the regulation or licensing of CATV systems, although these required a federal radio licence under the Radio Act because they made use of the radio frequency spectrum. For the rest, they were regarded as public utilities subject to provincial, or in some cases municipal, jurisdiction. But all this was changed in 1963, when the British Columbia Court of Appeal ruled that CATV systems were integrated undertakings, the component parts of which could not be separated, and that, as they were subject to federal jurisdiction in their radiocommunication aspects, they were consequently subject to federal jurisdiction in all aspects.* There were two consequences.

* British Columbia Court of Appeal: Public Utilities Commission vs Victoria Cablevision, (1965) 51 D.L.R. 2d 716.

The Minister of Transport agreed, although it was not required by the 1958 Broadcasting Act, to refer applications from CATV undertakings for radio licences to the BBG for its observations. For the purposes of the present Broadcasting Act, CATV systems were regulated as "broadcasting receiving undertakings" which, as such, require broadcasting licences and are subject to the regulatory authority of the CRTC.

C. PRINCIPAL CHANGES INTRODUCED IN 1968

As has been said, the Broadcasting Act proclaimed on 1 April 1968 replaced the BBG with the CRTC, a rather larger body with more clearly defined and significant supervisory and regulatory powers and authority. In addition to extending the authority of the federal regulatory body to cable television systems, the Act introduced an entirely new feature: for the first time, the right to issue broadcasting licences was devolved by the Government to the CRTC. Two safeguards were reserved. First, the Governor in Council was empowered to give directions to the CRTC on a number of matters, most importantly respecting "the classes of applicants to whom broadcasting licences may not be issued." This was necessary for two reasons. The 1958 Act included an attempt to prohibit foreign ownership (Section 14), which had not proved watertight; it was therefore thought more practical to govern this issue by Order in Council, which could be changed to close loopholes without having to resort to amending legislation. The other reason was that, for many years, the Government had maintained a policy of not issuing broadcasting licences to provincial governments or their agencies; as the Government was no longer to issue the licences itself, it had to be empowered to give directions in that regard. The second safeguard reserved to the Government the right to set aside or refer back licensing decisions of the CRTC; only once has the Government deemed it necessary to set aside a licensing decision.*

The most important feature of the Act was that it opened with a declaration of broadcasting policy for Canada (something that had been conspicuously lacking in the 1958 Act), which included a definition of the "national broadcasting service" to be provided by the CBC.

* On 10 November 1976 the Governor in Council set aside CRTC decisions of 16 September 1976 relative to the licensing of cable television in Brandon, Portage la Prairie, and Selkirk, Manitoba.

D. SECTION 3 OF THE BROADCASTING ACT*

Broadcasting Policy for Canada

3. It is hereby declared that:

- (a) broadcasting undertakings in Canada make use of radio frequencies that are public property and such undertakings constitute a single system, herein referred to as the Canadian broadcasting system, comprising public and private elements;
- (b) the Canadian broadcasting system should be effectively owned and controlled by Canadians so as to safeguard, enrich and strengthen the cultural, political, social and economic fabric of Canada;
- (c) all persons licensed to carry on broadcasting undertakings have a responsibility for programs they broadcast but the right to freedom of expression and the right of persons to receive programs, subject only to generally applicable statutes and regulations, is unquestioned;
- (d) the programming provided by the Canadian broadcasting system should be varied and comprehensive and should provide reasonable, balanced opportunity for the expression of differing views on matters of public concern, and the programming provided by each broadcaster should be of high standard, using predominantly Canadian creative and other resources;
- (e) all Canadians are entitled to broadcasting service in English and French as public funds become available;
- (f) there should be provided, through a corporation established by Parliament for the purpose, a national broadcasting service that is predominantly Canadian in content and character;

* RSC 1970, c. B-11, as amended.

- (g) the national broadcasting service should
 - (i) be a balanced service of information, enlightenment and entertainment for people of different ages, interests and tastes covering the whole range of programming in fair proportion,
 - (ii) be extended to all parts of Canada, as public funds become available,
 - (iii) be in English and French, serving the special needs of geographic regions, and actively contributing to the flow and exchange of cultural and regional information and entertainment, and
 - (iv) contribute to the development of national unity and provide for a continuing expression of Canadian identity;
- (h) where any conflict arises between the objectives of the national broadcasting service and the interests of the private element of the Canadian broadcasting system, it shall be resolved in the public interest but paramount consideration shall be given to the objectives of the national broadcasting service;
- (i) facilities should be provided within the Canadian broadcasting system for educational broadcasting; and
- (j) the regulation and supervision of the Canadian broadcasting system should be flexible and readily adaptable to scientific and technical advances;

and that the objectives of the broadcasting policy for Canada enunciated in this section can best be achieved by providing for the regulation and supervision of the Canadian broadcasting system by a single independent public authority.

The authority referred to in the last paragraph of Section 3, in fact the CRTC, was accordingly required (Section 15) to "regulate and supervise all aspects of the Canadian broadcasting system with a view to implementing the policy enunciated in Section 3."* The CRTC is responsible for implementing the policy laid down in the Act, which also governs the Minister of Communications, both in his capacity as parliamentary spokesman for the CRTC and in his administration of the Radio Act,** and also the CBC as well as the Secretary of State in his capacity as parliamentary spokesman for the Corporation and in his administration of the Secretary of State Act. This is the statutory framework that has governed the development of broadcasting in Canada during the past decade.

* But "Subject to this Act and the Radio Act and any directions issued from time to time by the Governor in Council under the authority of this Act."

** The Radio Act: RSC 1970, c.R-1.

II. TELEVISION

A. COVERAGE

1. Canada

By 1967, just over 96 per cent of the population of Canada could receive CBC-Radio-Canada television programs; some 75 per cent had access to other Canadian stations, and almost half (49 per cent)* could receive programs from stations in the United States. Ten years later, the CBC-Radio-Canada proportion had risen to over 98 per cent, other Canadian stations to nearly 95 per cent, and US stations to over 73 per cent.** These figures require some closer analysis.

The CBC-Radio-Canada is comprised both of stations owned-and-operated by the Corporation and affiliated private stations. The "other Canadian stations" include those affiliated to the CTV (TVA) network, independent stations (including Global), and provincially operated educational stations. "US stations" here will refer to affiliates of the three major networks (CBS, NBC, ABC), stations affiliated to more than one of these networks, independent stations, and the Public Broadcasting System; they have been aggregated to give an idea of access to US programming as a whole.

In considering access to television for the total population of Canada, the CBC-Radio-Canada figures are the key factor; it is safe to say that a Canadian who cannot receive the national broadcasting service cannot receive television at all. By 1967, some 15 years after the inception of television, the national service had commendably extended its coverage to more than 96 per cent of the people of Canada, but further expansion was hindered by the law of diminishing returns. It became necessary to institute a priority system based on cost per capita for extended coverage, and the two per cent added in the next decade was almost harder to achieve than what had already been done. The process was helped by the Accelerated Coverage Plan,*** approved by the Cabinet in January 1974 at a total cost of \$50 million; under the Plan, some 200 additional transmitters have been opened so far, at a cost of about \$40 million.

* In English-speaking Canada, 56.70 per cent.

** In English-speaking Canada, 78.33 per cent.

*** The Accelerated Coverage Plan is a special plan with funds voted by Parliament, to ensure that the radio and television services of the CBC-Radio-Canada are extended to communities larger than 500 people. A more complex formula applies to communities where there are minority language groups.

Coverage by other Canadian and US stations has been increased through the licensing of new Canadian stations, the increase in cable penetration, and the extension of the area covered by the use of higher power or the establishment of repeater stations. An important point to be made (in a more detailed way below) in connection with access to US programming is that the demography of Canada is such that, even before the rapid expansion of cable television, almost half the population could receive signals direct from US stations. The figures quoted also obscure the fact that people who may have been able to receive programming from only one US source in 1967 may now have access to everything available; in Manitoba, for instance, in 1967 the ABC network was available to some 69 per cent of the population and that was all,* whereas in 1977 this figure had increased to 72 per cent while 71 per cent had access to CBS, 73 per cent to NBC, and 71 per cent to PBS. The effect of such changes is treated thoroughly in later sections of this report.

In looking at the figures of overall coverage, it should be recalled that statistics are notoriously adaptable in support of differing, sometimes contrary, arguments. For some propositions, actual numbers are more compelling; if, for instance, it can be shown that 250,000 people viewed a particular program, it is more effective to say so in those terms than to admit that the program attracted only, say, 2.5 per cent of the total audience. Thus, if a total television coverage of 98 per cent of the population is to be regarded as a matter for satisfaction, or even pride, the fact remains that this means that there may be more than 400,000 Canadians who cannot receive television at all. But even this is not the end of the matter, for further analysis reveals that some 590,000 Canadians who can speak English and 250,000 Canadians who can speak French still cannot receive television in the official language that they habitually use.**

* This abnormal figure was due to the licensing by the FCC of a high-power transmitter in Pembina, North Dakota (population c.700), beaming directly into the Winnipeg market.

** CBC Annual Report, 1976-77. These figures are as of 31 March 1977 and are based on maps showing theoretical signal contours. Therefore, coverages reported are only statistical approximations of the true coverage by stations, particularly because television signals suffer a reduction in quality in areas of rough terrain. In this report, coverage statistics of stations not affiliated to the CBC are not derived in this manner, although they are also only statistical approximations. They are derived from statistics on the weekly reach of each station, as reported by BBM.

2. English-language Television Coverage

Table 1 shows the percentage of the entire population of each of the 10 provinces covered by English-language television stations of all kinds.* It is unfortunate that figures for Québec must be separated from those of the other nine provinces but this is a reality of measuring the extension of service in both official languages when the corresponding populations to be served are not evenly distributed. Because the English-speaking population in Québec is mainly in the Montréal area, the coverage of English-language television in Québec is much lower than for the rest of the country and would, if included in a total for all Canada, produce a figure which is too low in terms of evaluating the adequacy of service to English-speaking Canadians. Conversely, combining the coverage of French-language television in the other nine provinces with that of Québec would also produce a misleading measurement of service to French-speaking Canadians.

It will be seen that the CBC figure for nine provinces of 98.21 per cent for English-speaking Canada is distorted by that of 100.00 per cent for Ontario. The coverage of Saskatchewan, Alberta, British Columbia, and Prince Edward Island is still disquietingly below average, despite the obvious reason that those provinces have a proportionately higher number of remote communities than others.

Coverage by US stations shows the highest proportionate increase of all, and for this the rapid expansion of cable television systems is largely responsible. Cable penetration is, of course, strongest in the largest communities, and this, together with proximity to the US border, accounts for the high figures in Ontario and British Columbia. The very large increase for Alberta stems from the decision to permit microwave transmission to serve cable television in Calgary and Edmonton. The notable difference between Manitoba and Saskatchewan is demographically based, for more than half the population of the former is concentrated in the Winnipeg metropolitan area, while the population of Saskatchewan, only slightly smaller, is more evenly spread.**

* Coverage is, of course, still very thin in the Yukon and Northwest Territories.

** CRTC licences issued in 1976-1978 have extended cable television coverage in Saskatchewan, Manitoba, and Newfoundland, and to almost the whole of Alberta.

TABLE 1
ENGLISH-LANGUAGE TELEVISION COVERAGE
% of Population - November 1967 and 1977

	CBC		Other Canadian		United States	
	1967	1977	1967	1977	1967	1977
Nfld.	87.00	98.00	82.97	94.09	0.00	0.62
PEI	93.00	95.00	2.60	95.00	0.00	31.23
NS	99.00	99.00	62.05	99.00	0.00	64.13
NB	99.00	99.00	2.53	92.96	16.76	66.09
Ont.	99.00	100.00	78.61	95.59	81.32	93.65
Man.	96.00	98.00	76.09	98.00	68.58	74.83
Sask.	89.00	90.00	33.42	90.00	2.51	3.87
Alta.	93.00	96.00	83.22	96.00	4.10	81.87
BC	92.00	96.00	71.50	96.00	80.41	92.86
Total	96.10	98.21	70.42	95.54	56.70	81.46
Québec	76.65	85.36	63.36	82.95	29.27	48.87

General statistics on coverage obscure the effects of the introduction of additional channels in any category (as mentioned above in the case of Manitoba) and also the fact that new channels becoming available (by cable or by an increase of power) sometimes duplicate programming already available from an existing channel. Thus, access to a larger number of channels does not necessarily afford a proportionately wider choice of programming, although it will offer some unduplicated programming and it will also offer a choice of times to view particular programs. These factors must be borne in mind in any consideration of the increase in the number of channels available to people in different parts of Canada.

One more cautionary note should be sounded. The addition of US channels necessarily reduces the proportion of the total channels available that are Canadian, but this signifies no more than that a wider field of choice is being provided. As a *reductio ad absurdum*, if a US station becomes accessible to a community that previously relied on a single Canadian station, it could be said that the proportion of Canadian stations available had been reduced by 50 per cent; but this does not mean that the audience for the Canadian station has necessarily dropped to the same extent. The point becomes more important where the numbers of channels are greater, for the introduction of additional channels may cut deeply into the audiences of certain local Canadian stations. This point is resumed below in examining audience fragmentation.

3. French-language Television Coverage

Table 2 shows the percentage of the population in each of the 10 provinces covered by French-language television. Québec has been singled out, for its inclusion in a total for Canada would not give a true picture of television services available to the French-speaking population of Canada. It should be noted that Table 2 (as previously noted with regards to Table 1) gives statistical information that relates to the total population.

In 1967 the population of Québec was nearly entirely covered by Radio-Canada affiliated television stations. There were also three independent stations (Montréal, Québec, and Chicoutimi) that have since associated with other independent television stations to form what is known as the TVA network. The formation of this network together with the establishment of the educational Radio-Québec network with stations in Montréal, Québec, and Hull are the two most notable developments in the province during the decade under review. (There is a small spillover into Ontario from Radio-Québec, as there is from the TVA network.)

The Radio-Canada television service is deficient in some areas where there is concentration of French-speaking population, as in areas of New Brunswick where there is a majority of Acadians, but Radio-Canada has plans to implement services in these areas. The TVA network is limited to Québec residents, with one notable exception, the French-speaking population living along the Ontario side of the Ottawa River. The extension of this second service to the more densely populated French-speaking regions of New Brunswick and Ontario is one that should take place in the

TABLE 2
FRENCH-LANGUAGE TELEVISION COVERAGE
% of Population - November 1967 and 1977

	Radio-Canada		Radio-Québec		Other Canadian*	
	1967	1977	1967	1977	1967	1977
Nfld.	0.00	7.00				
PEI	20.00	22.00				
NS	9.57	63.00				
NB	60.85	86.00				
Ont.	16.83	88.00			7.79	9.68
Man.	70.00	75.00				
Sask.	0.00	28.00				
Alta.	0.00	66.00				
BC	0.00	53.00				
Total	16.66	72.83				
Québec	98.00	99.00	0.00	78.22	85.95	93.89

* In this table, "Other Canadian" refers to TVA stations.

near future. Also, when drawing conclusions about television services available to Canadians the following fact should not be overlooked: that although a large part of the French-speaking population of Canada can view most of the programming offered by the North American television networks, it has access, in Québec, to three French networks only and in the rest of Canada to Radio-Canada programming only.

4. CONCLUSIONS

1. The extension of Canadian broadcasting services to Canadians in the last decade has been a very significant and important achievement: 98.21 per cent of Canadians outside of Québec can now receive CBC television service and 95.54 per cent can receive other Canadian television services. In Québec, 99 per cent of the population receives Radio-Canada television service and French-language service has been extended to 72.83 per cent of English-speaking Canada.

2. The Canadian broadcasting system is rapidly achieving the realization of the Broadcasting Act objective to provide Canadian services to all Canadians in English and French.

3. There are, however, enormous financial and technical difficulties in providing basic Canadian services to the last two or three per cent of the population unserved. The methods adopted for providing this service in unserved areas may require irregular and novel technical and regulatory mechanisms in order to achieve fully the Broadcasting Act objective.

4. It should be emphasized that the statistics on the percentage of the population served are only statistical approximations. It is indeed possible that there are unserved or inadequately served areas which are overlooked by these measurements but they are on the aggregate a good indicator of the level of service.

5. The Accelerated Coverage Plan itself, while extending service to unserved areas, does present an additional complication. Small communities under the Plan now receive the full national radio or television network service, while many larger adjoining communities continue to be served by affiliates thereby receiving only a part of CBC-Radio-Canada national network service.

B. CABLE PENETRATION

1. Growth of Cable Television Undertakings

In 1968, there were already 377 CATV undertakings in operation in Canada; by 1977, the total had increased by only 48 to 425.* About half the increase was in the Atlantic provinces, including two in Prince Edward Island which had none in 1968. Other large increases were in Québec (13) and Alberta (12).

* This is a net increase; in Ontario, for instance, the total decreased, due to amalgamations, from 130 to 123.

It is evident that the dramatic growth in cable penetration throughout Canada has been generated by the consolidation and expansion of existing systems and by attracting new subscribers rather than by the absolute growth in the number of systems. The point is illustrated graphically in Figure A.

2. Availability of Cable Television Service

In 1970,* 52.4 per cent of the total homes in Canada lay in areas where cable television systems had been licensed. By 1977, this figure had increased to 74.4 per cent. In 1968-1970, however, many cable television systems were fairly recently in operation, and have since been busy extending the lay-out of their cables. Thus a more striking contrast is shown by the fact that homes actually passed by cable amounted to only 29.9 per cent of total homes in 1968, but had increased to 71.7 per cent by 1977. By far the highest potential penetration is in British Columbia, where 93.8 per cent of all homes are passed by cable, as shown in Table 3.

TABLE 3

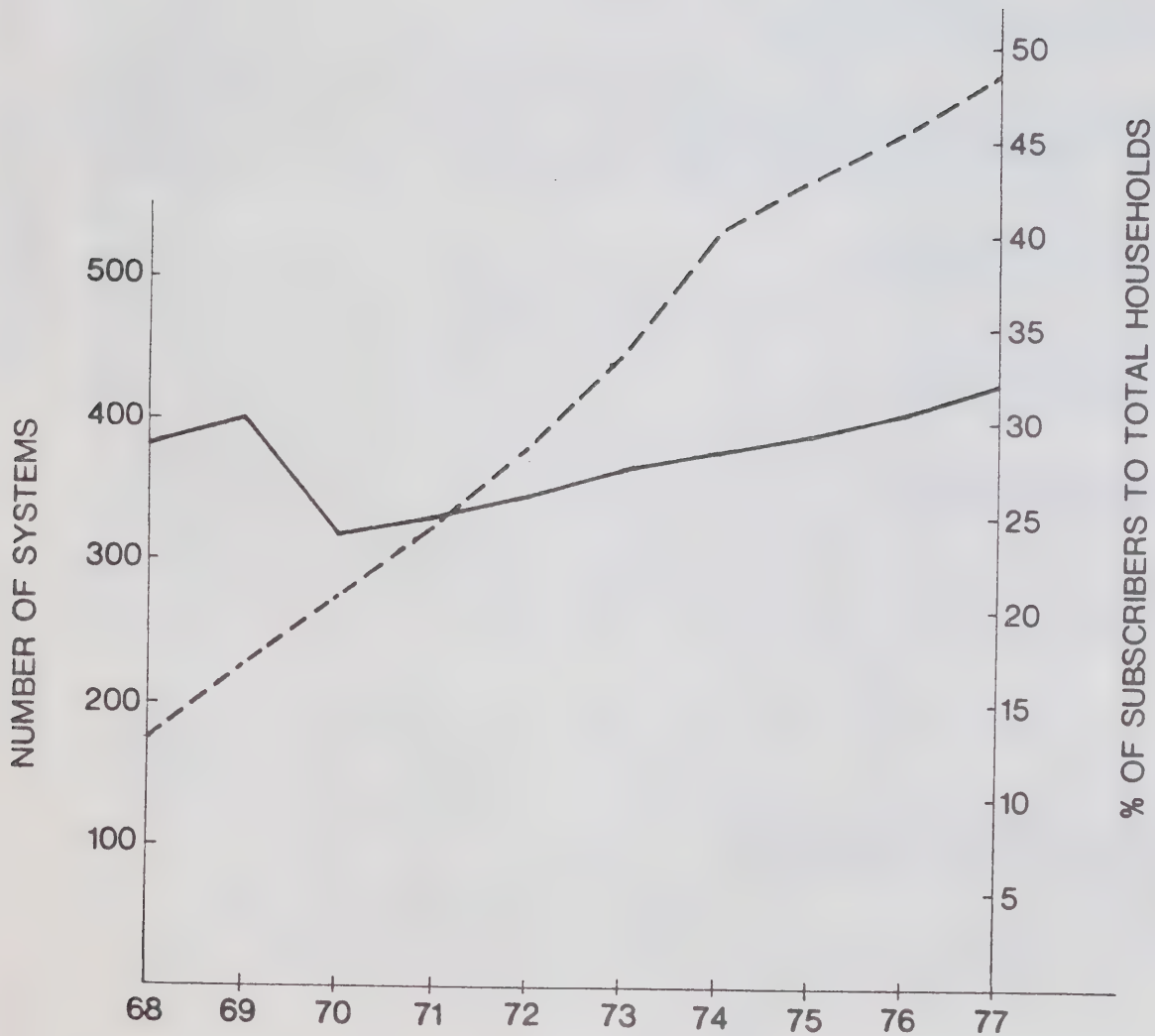
HOMES PASSED BY CABLE AS % OF TOTAL HOMES

	1968	1977
Newfoundland	*	0.3
Prince Edward Island	*	21.9
Nova Scotia	*	51.3
New Brunswick	*	51.4
Québec	38.2	73.2
Ontario	36.0	78.1
Manitoba	1.5	62.6
Saskatchewan	3.0	5.8
Alberta	3.9	74.6
British Columbia	53.6	93.8
Canada	29.9	71.7

* Data not available

* Figures not available for 1968.

FIGURE A
CABLE TELEVISION 1968-1977



— NUMBER OF SYSTEMS

----- % OF SUBSCRIBERS TO TOTAL HOUSEHOLDS

3. Growth in Numbers of Subscribers

In 1968, only 710,000 homes subscribed to cable television service, or 13.2 per cent of all the homes in Canada. By 1977, the number of subscribers had grown to 3,419,000, almost five times as many as in 1968, representing 48.5 per cent of total homes (81 per cent in British Columbia). This growth has been concentrated, for the most part, in the larger communities, for there are vast areas of Canada in which cable service is not, and generally will not be, available. It is therefore rather more informative to relate the growth in subscriptions to the actual availability of cable service, in terms of homes passed by cable, as described in Figure C. Here, 44.2 per cent of the homes passed by cable in 1968 were subscribers; the figure for 1977 was 67.6 per cent. The rate of growth, as shown in Figure A, has been fairly constant, except for a sudden spurt in 1973-74.

To sum up, just less than half the homes in Canada today subscribe to cable television service, while more than two-thirds of those to which service is immediately available choose to subscribe to it. But these total figures for Canada obscure some very wide regional disparities, as will be seen from Figures B and C.

Ontario has by far the largest number of subscribers, which rose from 302,000 in 1967 to 1,518,000 in 1977 (almost 45 per cent of the total for Canada). These figures represent, for 1977, 57.5 per cent of total homes and 73.6 per cent of homes passed by cable. In percentages, however, British Columbia is far ahead, for no less than 80.9 per cent of total homes subscribe, and 86.2 per cent of those passed by cable. An interesting aspect of these figures is that Vancouver and Victoria have direct access to US stations off-air, as do Toronto and the other large conurbations in southwestern Ontario; the inference is that the attraction of cable service in these areas lies very largely in the improved signal quality provided.

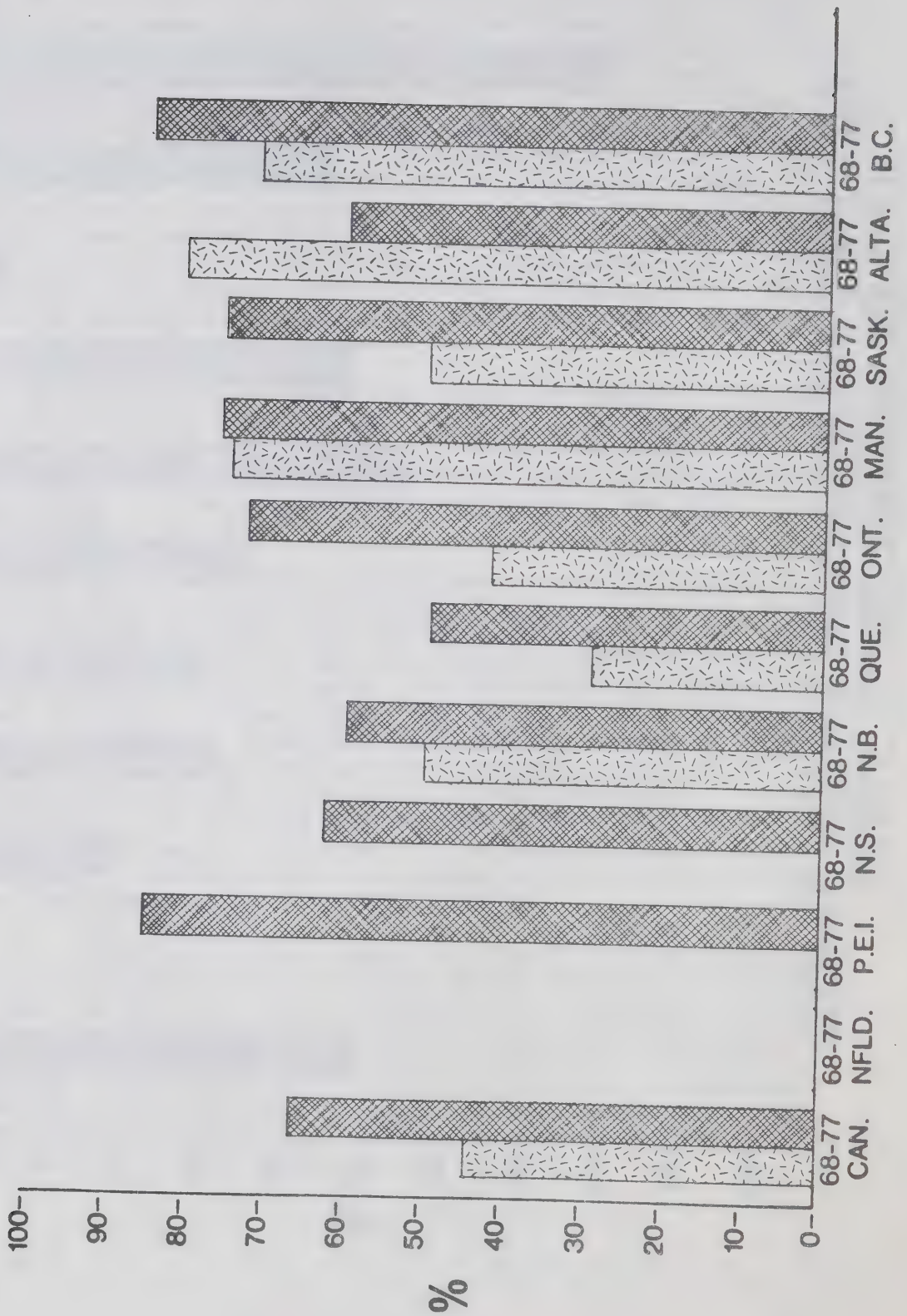
In Alberta and Manitoba, the rate of growth has been very marked, and from two-thirds to three-quarters of the homes passed by cable are subscribers; Saskatchewan lags far behind. In the Atlantic provinces, excluding Newfoundland, the rate has been even higher, although the final percentages are lower: only about a quarter of total homes are subscribers, but this is a factor of availability, for nearly two-thirds of those to which service is immediately available do in fact subscribe to it.

FIGURE B

CABLE SUBSCRIBERS AS % OF TOTAL HOMES BY PROVINCE 1968-1977



FIGURE C
CABLE SUBSCRIBERS AS % OF HOMES
PASSED BY CABLE BY PROVINCE 1968-1977



In Québec, 36.5 per cent of total homes are subscribers; of those homes that are passed by cable, 49.9 per cent are subscribers, which is less than that for the other provinces.

Reverting to the general picture for Canada, it is to be noted that there has been a substantial increase in the number of television channels carried by cable systems. In 1968, no cable system offered more than 12 channels, whereas by 1977 more than half the cable television subscribers were able to receive more than 12 channels through the introduction of converter service. As of June 1978, Ontario had the highest percentage of cable subscribers (83.13 per cent) to whom converter service was available, followed by Québec (69.48 per cent) and British Columbia (16.68 per cent); converter service has not yet been introduced in the other provinces.

It is often said that Canada is the most heavily cabled country in the world per capita, but this may no longer be true since the Netherlands Government embarked on a policy of making cable available to every household in the country. But, however that may be, it is undoubtedly a fact that the provinces of British Columbia and Ontario are world leaders in this regard (these two contain close to half the total population of Canada), and the others are hard on their heels. Like King Canute, we cannot stem the tide, and the hard facts of cable penetration must be given their full weight in devising any effective future policy for broadcasting in Canada.

4. CONCLUSIONS

1. Cable television has expanded dramatically in the decade under review: 29.9 per cent of Canadian homes were actually passed by cable in 1968; now that figure has risen to 71.7 per cent in 1977. In addition, in 1968, 710,000 homes subscribed to cable television service and by 1977 the number had risen to 3,419,000 representing 68 per cent of the homes passed by cable. Just less than half the homes in Canada in 1977 subscribed to cable television service.

2. The data for provinces obscure the heavy concentration of cable subscribers in large cities close to the US border, particularly in Ontario and British Columbia, where most residents could receive more US stations off-air than those elsewhere. While the viewing of US stations is widespread in most parts of Canada, it was essentially an urban phenomenon in the early years of the decade. Now cable is being extended to rural population centres of 1,000 residents or less.

3. There is a new majority of Canadians now subscribing to cable television and since the extension of cable service is approaching its economic limits, as measured by the percentage of total homes to which it can be made available, the industry has diverted its energy and focus to the provision of new services with new technology.

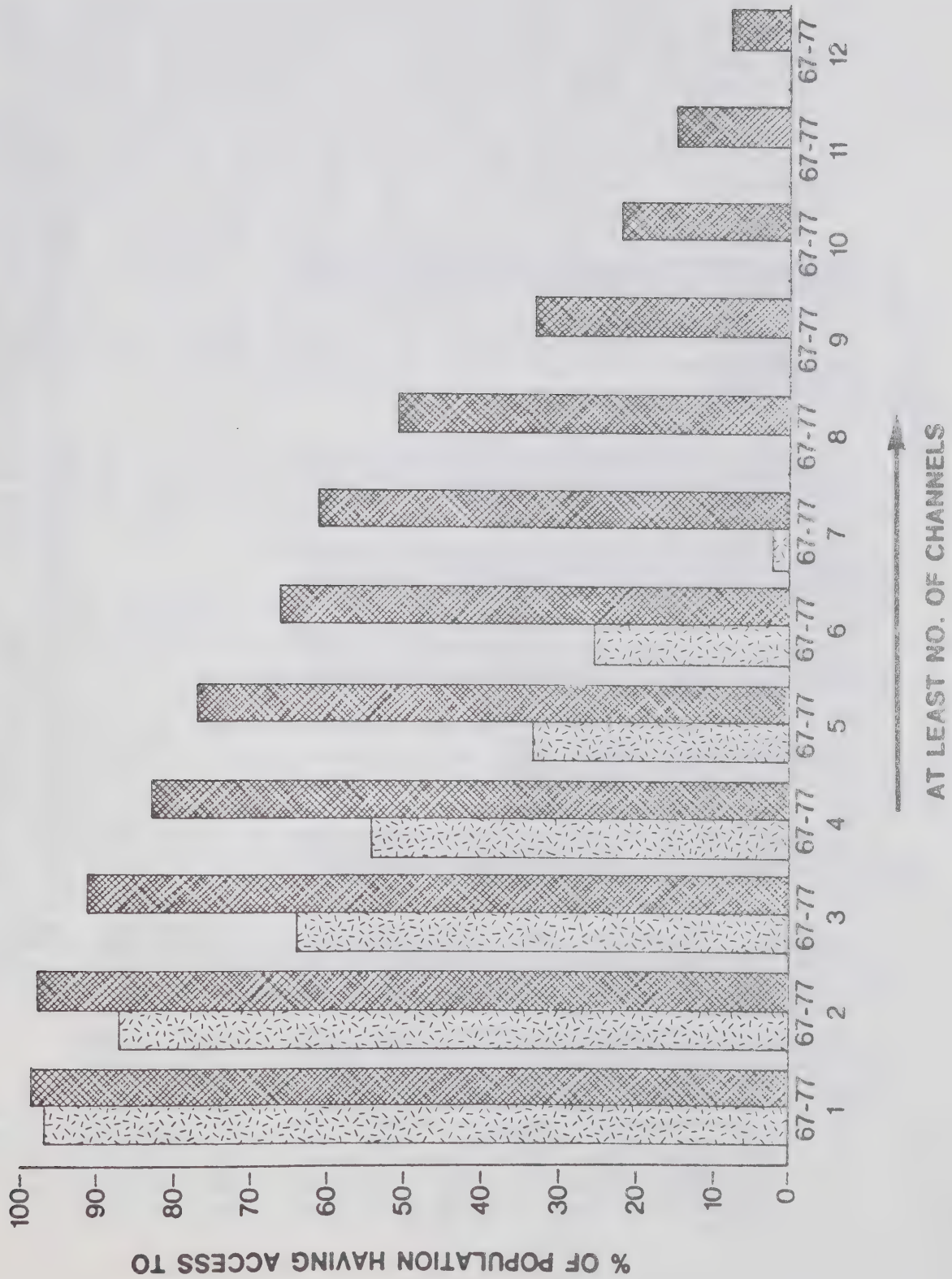
C. OPTIONS AVAILABLE TO CANADIAN AUDIENCES

Before examining viewing patterns, it is necessary to review the changes that have occurred in the range of choice available. It will be seen from Figure D that more than half the population of Canada had access to at least four channels in 1967. In 1977, about 80 per cent had access to at least four, and more than half to eight. The real range of choice in programming is in fact rather narrower, because the number of those channels that carry the same, or mostly the same, programming has also increased, but the diversity of programming available is nonetheless much wider than it was 10 years ago. There are, of course, marked differences among provinces, but these are perhaps more readily appreciated by looking at the percentage of the population having access to one kind of programming or another than by working on "average numbers of channels available." If, for instance, some people in a province have only one channel available while others have access to eight, an average figure of, say, 2.6 channels tells us very little. The availability is analyzed below by language of programming.

It has been said earlier that too much significance should not be attached to the relative proportions of Canadian and US channels available, especially in relation to a particular area. In a more general way, however, it is interesting to note that the proportion of English-language Canadian channels available overall in English-speaking Canada has remained at about 62 per cent; excluding the duplicate channels, the proportion has remained between 58 and 59 per cent.* In the provinces that were later than some others in the development of cable television undertakings, the Canadian proportion has inevitably declined for the reasons explained above, but the fundamental point is the range of choice between Canadian and US channels that has become available.

* These proportions exclude Canadian educational channels (TVOntario and Radio-Québec) and the PBS stations in the United States.

FIGURE D.
ACCESS TO CHANNELS
TOTAL CANADA



1. English-language Options

a. Canada (Excluding Québec)

In 1967, almost all Canadians had access to the CBC network, and the increase has therefore been only marginal. Coverage by the CTV network has increased by more than one-third to some 96 per cent. Coverage by Canadian "independents" is now about 70 per cent compared to under 30 per cent in 1967, but this figure is heavily weighted by the availability of the Global stations in large areas of Ontario.* Ontario, too, has the benefit of the TVOntario educational television system, which is available to about 85 per cent of the population of the province. The general picture for English-speaking Canada is shown in Figure E. Similar statistics are available for each of the provinces, but can be most simply summarized as follows, in the knowledge that access to the CBC network and the CTV network is widespread although there are differences in the order of 10 per cent between one province and another:

- In Ontario, CTV coverage has increased by about 17 per cent and "independent" coverage by nearly 30 per cent, while TVOntario has been added; residents of Ontario have, generally speaking, by far the widest choice of Canadian English-language channels.
- In Manitoba, Alberta, and British Columbia, CTV coverage has increased substantially, and "independent" coverage, non-existent in 1967, now extends to between 70 and 90 per cent of the respective populations.
- In Newfoundland, Prince Edward Island, Nova Scotia, New Brunswick, and Saskatchewan only the CBC and CTV networks are available; coverage by the latter has increased by large amounts with the introduction of CTV affiliates where there were none before, and now ranges from some 90 per cent in Saskatchewan to almost 100 per cent in Nova Scotia.

Briefly, some 6,000,000 English-speaking Canadians in English-speaking Canada have a choice of Canadian English-language programming that they did not have in 1967.

* By 1977, eight English-language independent stations had been licensed while in 1967 the only independent was CHCH Hamilton. The others are: CITY Toronto, Global in southern Ontario, CKND Winnipeg, CJOC Lethbridge, CITV Edmonton, CFAC Calgary, and CKVU Vancouver.

FIGURE E

ENGLISH LANGUAGE TELEVISION OPTIONS-CANADA (EXCLUDING QUEBEC)

% OF POPULATION HAVING ACCESS
TO CANADIAN AND US CHANNELS

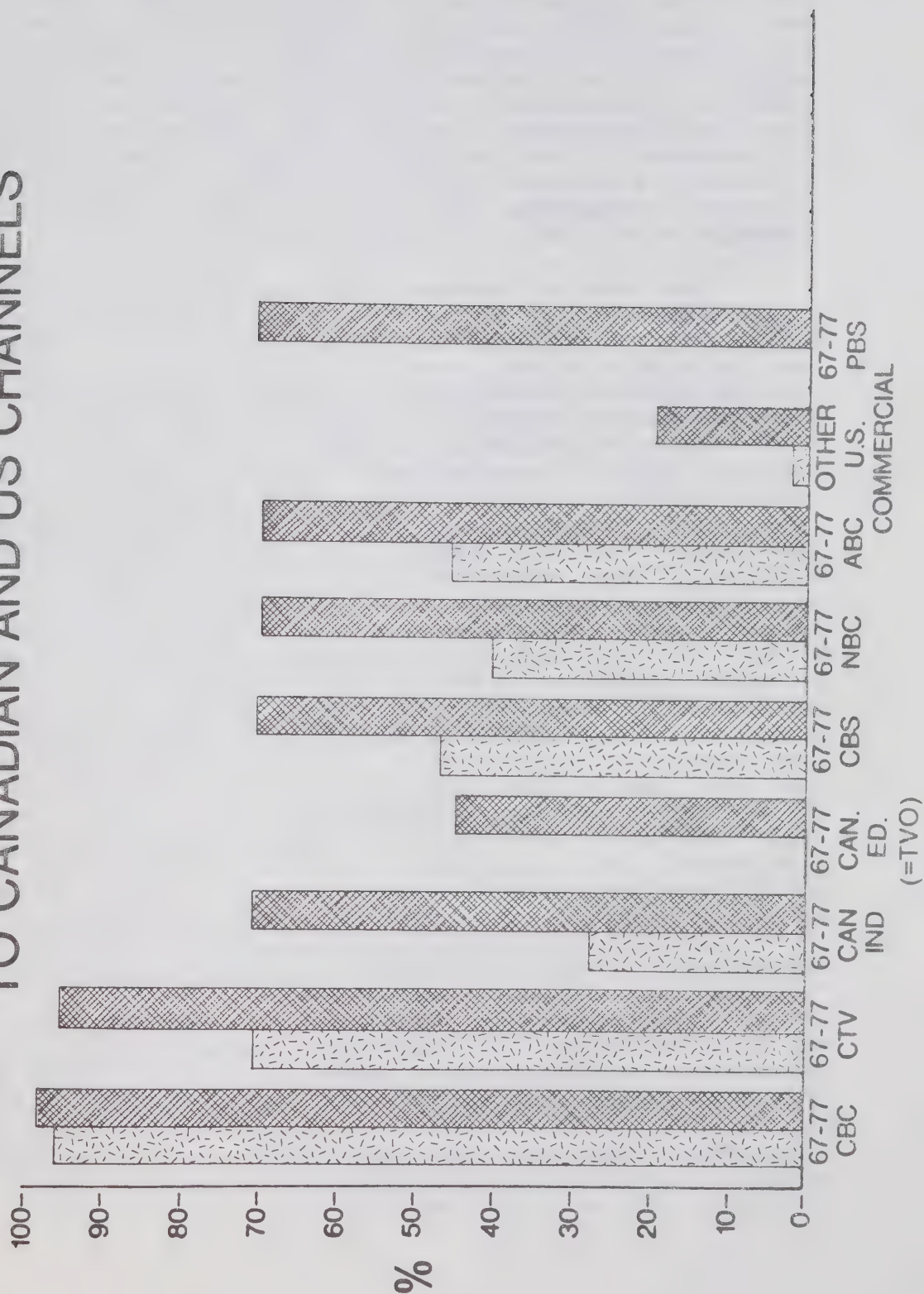


Figure E also shows, to the right, the growth of available choice among US stations. In 1967, almost 57 per cent of the people in English-speaking Canada had access to one or more of the three commercial US networks, with CBS in first place, ABC close behind, and NBC in the rear by a small margin; the PBS stations had not yet come into existence. In 1977, the availability of CBS, ABC, and NBC was about level at around 70 per cent; some 20 per cent had access to US "independents"; and the PBS coverage had increased from none to about the same level, 70 per cent, as each of the three US commercial networks. One way or another, more than 81 per cent had access to at least one US channel.

Here again, however, overall percentages obscure the true differences in options available in English-speaking Canada between Canadian and US channels. The increase in available US stations, province by province, is substantially greater than the increase in available Canadian stations. Only in Ontario, Manitoba, Alberta, and British Columbia are more than two Canadian stations available (excluding duplicates of network programming), while over 85 per cent of the people in Ontario, alone among the English-speaking provinces, have access to a fourth Canadian source of programming, TVOntario. In 1967, Ontario was the only province where viewers (57 per cent) had access to more than two Canadian services. In contrast, whereas in 1967 substantial percentages only in Ontario, Manitoba, British Columbia, and, at a much lower level, New Brunswick had access to even one US station, by 1977 some people in every province but Newfoundland and Prince Edward Island had a choice of three or more US stations, while five were available to 43 and 73 per cent of the respective populations of Ontario and British Columbia. The fact that a large proportion of English-speaking Canadians have a wider choice of programming among US than among Canadian stations is an important factor in audience patterns, as discussed in the section on audience fragmentation. Excluding educational channels (Canadian and PBS), it can be observed that almost the exact proportion of English-speaking Canadians which had access to three Canadian channels (71.34 per cent), had access to three US commercial channels (70.44 per cent).

It is widely believed and often said that the advent of cable television has had the result of leading a large majority of Canadians to watch US rather than Canadian television stations, but this is not completely accurate. To start with, nearly half the population of Canada always could (and still can) watch US stations off-air, and many of them chose to do so before cable television was available. For them, the attraction of cable lies in the improved image

that is received and, with a converter, the wider range of choice available. Microwave transmissions have, however, opened up new areas of Canada to penetration by US stations, a notable example being Edmonton, which is too far from the border to receive off-air signals. Further, between 1967 and 1977, the percentage of Canadians to whom cable television was immediately available rose from 29.9 per cent to 71.7 per cent (see Figure C). Whereas in 1967, 48.75 per cent of all Canadians had access to at least one US channel and 30.39 to three or more, the corresponding figures for 1977 are 70.62 per cent and 54.20 per cent. In sum, in these 10 years, largely due to the introduction of cable television, more than twice as many people are now able to watch US stations if they wish to, and in many parts of the country the range of choice has widened substantially.

b. Québec

As in the rest of Canada, the increase in US options in Québec far exceeds the increase in Canadian options. In 1967, 63 per cent of the population of Québec had access to two Canadian English-language channels; by 1977, the proportion had risen to 83 per cent, and a few had access to a third choice in TVOntario. While the percentage availability of US channels is much lower, the increase of available options is quite remarkable. From only 29 per cent who had access to at least one US channel in 1967, 29 per cent now have access to four US channels, and 18 per cent to five; from 36 to 49 per cent of the population of Québec now have access to up to three US channels. This is a factor that is relevant to the complex process of analyzing audience patterns in Québec when the language of programming is to be taken into account.

2. French-language Options

a. Québec

As in the other nine provinces, coverage by the national service was virtually completed in 1967 and although coverage by the second French-language service, which subsequently became TVA, was also high in 1967, it was far from complete. It has increased from 85.95 per cent in 1967 to 93.89 per cent in 1977. As discussed previously, the Radio-Québec educational service has been initiated, although its broadcast hours are more limited. Therefore in terms of French-language options, the options available to the population of Québec have increased from two to three.

While the range of French-language options has increased, and Québécois who are bilingual can be considered to benefit potentially from the various English-language services, the range of French-language options is less than the equivalent English-language services available in many other provinces where independent stations have been licensed. Montréal, for example, as one of the major metropolitan centres has only four French-language options while Toronto has six English-language options (CBC, CTV, CITY, Global, CHCH, and TVO).

b. English-speaking Canada

Except for a small spillover from the TVA and Radio-Québec network into Ontario, the only French-language television service available in English-speaking Canada is that of Radio-Canada. It is, though, a notable achievement that this service has been extended to almost three-quarters of the population in the past 10 years.

3. CONCLUSIONS

1. It is important to appreciate that at the beginning of the decade under review, almost 57 per cent of the people in English-speaking Canada had access to one or more of the three commercial US networks.
2. In 1977 English-speaking Canadians had a wider choice of US than Canadian channels. In fact, if one were to include educational stations (Canadian and PBS) then 62.35 per cent of the population of English-speaking Canada had access to four US channels and only 45.61 per cent of English-speaking Canadians had access to four Canadian channels. Excluding educational channels, it will be observed that almost precisely the exact proportion of English-speaking Canadians to which three Canadian channels were available (71.34 per cent) had access to three US commercial channels (70.44 per cent).
3. The increase in the decade of available US options in Québec is quite remarkable. While only 29 per cent of the population had access to one US channel in 1967, now 49 per cent of the population has access to one channel and 36 per cent of the population has access to three or more US channels.
4. The fact that a large proportion of all Canadians have a wider choice of programming among US than among Canadian stations is a very important factor, especially as it relates to the Broadcasting Act objective of the predominance of programming using Canadian creative and other resources.

D. TELEVISION AUDIENCE FRAGMENTATION AND CABLE IMPACT

Although there may be changes from year to year in the amount of time spent on watching television, it may nonetheless be regarded as a constant, in the sense that the availability of a new channel does not directly affect it. It follows, then, that if any people start viewing the new channel at all, some of the formerly available channels must lose some of their share of the total audience. This is what is meant by audience fragmentation.

In the elaboration of fragmentation, audience shares are measured for the full broadcasting day; thus they differ from, and should not be related to, the figures in the section on television audience patterns, which are based on the period from 6 pm to midnight only.

The increase in the number of options available has been examined. To recapitulate, that increase is comprised of three elements: the extension of cable coverage, thus increasing the availability of US stations, the licensing of new Canadian stations, and the emergence of new US stations accessible in Canada. Because of these changes over the decade in the number and variety of television channels available in various markets, the relative viewing audience share of different types of stations changed accordingly. This section first gives the overall changes in the audience shares for different types of TV stations and then discusses more specifically the impact of cable television and of new Canadian independent stations on audience fragmentation.

1. Viewing Audience Shares: 1967 - 1977

Table 4 shows the audience share (1967 and 1977) for each type of TV station for each province and for the whole country.

a. English-language Television Stations

In English-speaking Canada, the audience of Canadian English-language stations declined from 74.12 per cent in 1967 to 69.53 per cent in 1977, while that of US stations rose from 24.28 to 29.19 per cent. Among Canadian stations changes in audience shares are in part attributable to the licensing of new Canadian stations in Ontario, Manitoba, Alberta, and British Columbia, the only provinces in which there is access to two or more Canadian channels, excluding those that duplicate, in whole or in part, programming that is already available.

TABLE 4

VIEWING AUDIENCE SHARE: 1967 - 1977
Shows the viewing audience share for each type of TV station
for each province and for all Canada
November 1967 - November 1977

		CBCO	CBCA	CTV	CAN IND	GLO- BAL	CAN ED	CBS	NBC	ABC	MULTI		PBS	RCO	RCA	TVA	ENG			FR STNS	TOTAL
											AFF	US IND					CAN STNS	US STNS			
Nfld.	1967	39.36	1.22	59.41	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	100.00	0.00	0.00	100.00
	1977	39.12	0.00	60.66	0.00	0.00	0.00	0.00	0.00	0.22	0.00	0.00	0.00	0.00	0.00	0.00	0.00	99.78	0.22	0.00	100.00
PEI	1967	0.00	98.85	0.74	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.41	0.00	0.00	0.00	99.59	0.00	0.41	100.00
	1977	35.30	9.03	46.16	0.00	0.00	0.00	0.00	6.08	3.43	0.00	0.00	0.00	0.00	0.00	0.00	0.00	90.49	9.51	0.00	100.00
NS	1967	29.91	39.97	29.98	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.15	0.00	0.00	0.00	99.85	0.00	0.15	100.00
	1977	26.48	1.92	55.92	0.00	0.00	0.00	0.00	6.65	8.31	0.00	0.00	0.73	0.00	0.00	0.00	0.00	84.31	15.69	0.00	100.00
NB	1967	0.00	76.68	0.47	0.00	0.00	0.00	0.27	0.20	0.08	4.31	0.00	0.04	1.88	16.07	0.00	0.00	77.15	4.90	17.94	100.00
	1977	0.26	28.25	41.12	0.00	0.00	0.00	5.04	5.02	6.42	0.00	0.00	0.25	1.05	12.58	0.00	0.00	69.63	16.74	13.63	100.00
Ont.	1967	14.18	21.07	19.63	7.57	0.00	0.00	12.74	9.91	9.82	3.18	0.28	0.00	1.05	0.26	0.31	0.00	62.45	35.93	1.62	100.00
	1977	9.51	10.80	22.23	9.51	9.51	1.24	10.13	9.61	11.40	0.51	3.01	1.14	0.99	0.00	0.43	0.00	62.79	35.79	1.42	100.00
Man.	1967	30.20	20.13	34.06	0.00	0.00	0.00	0.00	0.00	14.95	0.18	0.05	0.00	0.43	0.00	0.00	0.00	84.39	15.17	0.43	100.00
	1977	21.49	7.00	29.95	17.95	0.00	0.00	6.54	6.53	8.29	0.12	0.00	1.55	0.58	0.00	0.00	0.00	76.40	23.03	0.58	100.00
Sask.	1967	0.24	87.38	11.75	0.00	0.00	0.00	0.00	0.28	0.00	0.35	0.00	0.00	0.00	0.00	0.00	0.00	99.37	0.63	0.00	100.00
	1977	16.69	22.07	60.35	0.00	0.00	0.00	0.00	0.30	0.00	0.39	0.00	0.00	0.20	0.00	0.00	0.00	99.11	0.69	0.20	100.00
Alta.	1967	21.65	28.31	48.60	0.00	0.00	0.00	0.00	0.62	0.00	0.82	0.00	0.00	0.00	0.00	0.00	0.00	98.56	1.44	0.00	100.00
	1977	16.22	4.08	39.04	20.95	0.00	0.00	5.80	4.97	6.42	1.70	0.00	0.82	0.00	0.00	0.00	0.00	80.29	19.71	0.00	100.00
BC	1967	18.63	25.03	15.43	0.00	0.00	0.00	27.35	4.69	8.04	0.00	0.83	0.00	0.00	0.00	0.00	0.00	59.09	40.91	0.00	100.00
	1977	12.65	15.72	24.09	7.50	0.00	0.00	16.68	9.58	9.76	0.11	2.02	1.89	0.00	0.00	0.00	0.00	59.97	40.03	0.00	100.00
English Canada	1967	16.70	30.12	23.58	3.72	0.00	0.00	9.72	5.55	6.89	1.86	0.25	0.00	0.64	0.81	0.15	0.00	74.12	24.28	1.60	100.00
	1977	13.19	11.07	30.23	9.34	5.05	0.66	8.80	7.81	9.13	0.49	1.87	1.08	0.61	0.45	0.23	0.00	69.53	29.19	1.29	100.00
Québec	1967	5.69	1.42	9.03	0.00	0.00	0.00	1.81	0.00	0.78	1.19	0.00	0.00	19.36	22.43	38.28	16.14	3.79	80.07	100.00	
	1977	4.19	1.17	11.49	0.00	0.00	0.94	3.36	2.84	2.45	0.00	0.00	0.20	20.47	14.00	38.89	16.85	8.84	74.30	100.00	
Canada	1967	13.18	20.96	18.93	2.53	0.00	0.00	7.20	3.78	4.94	1.65	0.17	0.00	6.61	7.72	12.32	55.61	17.74	26.65	100.00	
	1977	10.65	8.28	24.95	6.70	3.63	0.74	7.27	6.41	7.25	0.35	1.34	0.83	6.21	4.27	11.12	54.68	23.45	21.87	100.00	

i. CBC-O: CBC Owned-and-Operated Television Stations

In spite of an increase in the number of CBC owned-and-operated stations over the period, the audience share of these stations dropped from 13.18 per cent in 1967 to 10.65 per cent in 1977: 16.70 to 13.19 per cent in English-speaking Canada and 5.69 to 4.19 per cent in Québec. In Newfoundland, the audience share of CBC stations stayed about the same. It is to be noted that in Newfoundland, there were no new television stations made available either through cable or through licencing of independent stations in the period.

ii. CBC-A: Privately-Owned CBC Affiliate Television Stations

Over the decade, the privately-owned CBC stations experienced the biggest loss in the audience share, from 20.96 per cent in 1967 to 8.28 per cent in 1977. In English Canada, they had the largest audience share of 30.12 per cent in 1967; by 1977, their audience share had been reduced to a mere 11.07 per cent. It should be noted that some of these stations became CBC owned-and-operated stations while others became independent or CTV affiliate stations.

iii. CTV

While the CBC owned and affiliated stations experienced considerable losses in their audience shares, CTV was able to increase its audience share from 18.93 per cent in 1967 to 24.95 per cent in 1977. In English Canada, the audience share of CTV stations increased from 23.58 to 30.23 per cent and in Québec, their audience share increased from 9.03 to 11.49 per cent. One of the reasons for these increases is that while in 1967 CTV was available to only 68.37 per cent of the population, by 1977, it had increased its coverage to 92.28 per cent.

iv. CAN IND: Canadian Independent Stations
(including Global)

As a result of an increase in the number of independent stations, their audience share increased from 2.53 in 1967 to 10.33 per cent in 1977: 3.72 to 14.39 per cent in English-speaking Canada. The audience share of Canadian independent stations increased from 7.57 to 19.02 per cent in Ontario, 0 to 17.95 per cent in Manitoba, 0 to 20.95 per cent in Alberta, and 0 to 7.5 per cent in British Columbia; there are no independent stations in the remaining provinces.

v. CAN ED: Canadian Educational Stations

The audience share of educational stations increased from 0 in 1967 to .74 per cent in 1977. Ontario (1.24 per cent) and Québec (.94 per cent) are the only two provinces to have educational television stations.

vi. US Stations

The audience share for US stations in English-speaking Canada increased from 24.28 per cent in 1967 to 29.19 per cent in 1977. It has already been demonstrated (p.24) that the range of choice among US stations increased more than among Canadian stations. Table 5 shows that this was an important factor in the increased audience share for US stations from one province to another. In this respect, the provinces (excluding Newfoundland and Saskatchewan, where access to US stations was negligible even in 1977) fall into three classes:

- Prince Edward Island, Nova Scotia, and New Brunswick, where none or few of the people had any access to US stations in 1967 but large numbers had access to two or more in 1977;
- Alberta, where very few people had access to even one US station in 1967 and a large number had access to three or more in 1977;
- Manitoba, Ontario, and British Columbia, where large numbers of people had access to two or more US stations in 1967, while about three-quarters or more of the people in these provinces had access to three or more in 1977.

It will be seen that there was no increase but rather a slight decline in the audience shares for US stations in Ontario and British Columbia, the provinces that already had the widest choice in 1967, and that the largest increases occurred in the provinces that had the least choice, or none at all, in 1967. The figures for Québec are of a different order, and suggest that the increase in the availability of US stations has increased their audience share from 4 to 9 per cent almost in direct proportion and, as mentioned above, this has been at the expense of the French-language stations in the province.

TABLE 5

AVAILABILITY AND AUDIENCE SHARE OF US STATIONS

		US Stations Available to % of Population		US Stations: % of Audience	
		1967	1977	1967	1977
GROUP A					
Prince Edward Island	At least one:	0.00	31.23	0.00	9.51
	At least two:	0.00	26.75		
Nova Scotia	At least one:	0.00	64.13	0.00	15.69
	At least two:	0.00	56.27		
New Brunswick	At least one:	16.76	56.93	4.90	16.74
	At least two:	1.73	50.58		
GROUP B					
Alberta	At least one:	4.10	74.93	1.44	19.71
	At least three:	0.00	60.03		
GROUP C					
Manitoba	At least one:	68.58*	74.83	15.17	23.03
	At least three:	0.50	70.68		
Ontario	At least two:	73.96	84.55	35.93	35.79
	At least three:	69.23	75.59		
British Columbia	At least two:	52.79	84.31	40.91	40.03
	At least three:	39.90	77.46		
Québec	At least one:	29.27	48.87	3.79	8.84
	At least two:	21.28	41.52		

* See note, p.8, describing the circumstances in metropolitan Winnipeg in 1967.

b. French-language Television

The coverage of Radio-Canada stations in Québec has increased from 98.00 to 99.00 per cent, and that of the TVA (and formerly independent) stations from 85.95 to 93.89 per cent. The only new option that became available was Radio-Québec, with a coverage of over 78 per cent of the population. The Radio-Canada owned-and-operated stations and the TVA stations held their own with audience shares of about 20 and 38 per cent respectively, while Radio-Québec achieved a share of only 0.94 per cent in 1977. The loss of audience to US stations, to which attention has been drawn above, was almost entirely at the expense of the Radio-Canada affiliates; their audience share fell from 22.43 per cent in 1967 to only 14.00 per cent in 1977.

In English-speaking Canada, despite an increase of French-language coverage from 16.66 to 72.83 per cent during the decade, the audience share, small as it was in 1967, declined from 1.60 to 1.29 per cent, mostly at the expense of Radio-Canada affiliates in New Brunswick.

2. Impact of Cable Television on Audience Fragmentation of Canadian Television Stations

The changes in the audience share of various types of television stations over the last decade, as outlined in the previous section, cannot be directly related as such to the growth of cable television. The growth in cable television does not always result in the audience fragmentation of Canadian television stations. Whether or not any significant audience fragmentation (of Canadian TV stations) occurs depends upon many factors. For example, if the US channels carried by cable television are also available directly off-air, the subscriber may use cable television for its improvement of the technical quality of various channels. No significant audience fragmentation is likely to occur in such cases. Cable television will result in audience fragmentation if it makes available some additional US channels which are not available otherwise. The following gives some typical cases to illustrate the impact of cable television on the audience fragmentation of Canadian television stations.*

* The impact of cable is discussed only for English Canada and for English-language commercial Canadian television stations.

a. Two Primary Commercial Canadian Television Channels
and Two Primary Commercial US Television Channels

Since the channel configuration available to non-subscribers remains unaffected with the introduction of cable, we will consider the loss in the audience share of Canadian channels among cable subscribers only. (The audience share of Canadian stations among non-subscribers obviously remains unaffected.)

Table 6 shows the audience share of Canadian stations among cable subscribers for five market areas. Each of these markets had two Canadian stations (CBC and CTV). US stations were only minimally available directly off-air such that the average audience share for the Canadian stations among off-air viewers was 95 per cent. In all markets cable television carried, in addition to the Canadian stations, two US network signals and a PBS channel (except for Medicine Hat where cable did not carry any PBS station). The PBS station obtained a negligible share of the audience, between 0 and 2 per cent. On the average, the audience share of US stations, among cable subscribers, was 40 per cent and the share of Canadian stations, therefore, 60 per cent. In the absence of any US stations, the share of Canadian stations would obviously have been 100 per cent.

Thus, where two US commercial stations are imported by cable in a market which has two Canadian commercial stations, the US stations typically obtain 40 per cent of the audience at the expense of Canadian stations (among cable subscribers). In the case of these five markets, the average audience share of Canadian stations decreased from 95 to 60 per cent due to cable television.

b. Addition of a Third US Channel (Two Canadian and
Three US Commercial Channels)

At the time of the survey, there was only one market, Kelowna, BC, in which there were two Canadian and three US commercial channels available only on cable. The off-air availability of US channels was minimal, so that their audience share among non-subscribers was only 4 per cent. Among cable subscribers, the audience share of Canadian stations was only 53 per cent as against 96 per cent among non-subscribers.

TABLE 6

AUDIENCE SHARE AMONG CABLE SUBSCRIBERS
(Two Canadian and Two US Commercial Channels)

BBM No.	Market	Audience Share of:		US Channels Carried by Cable*
		Canadian Stations %	US Stations %	
2079	Halifax	65	35	ABC, NBC, PBS
5009	Cornwall*	61	39	CBS, NBC, PBS
5539	Thunder Bay	60	40	CBS, NBC, PBS
8009	Medicine Hat	49	51	ABC, NBC
9209	Kamloops	64	36	ABC, NBC, PBS
Average		60	40	

Source: BBM January 1976 Audience Survey.

* In Cornwall, an ABC channel was also available but its technical quality (at the time of the survey) was so poor that its share of the audience was less than 5 per cent.

Although there were no other similar markets, it is instructive to examine the audience shares among cable subscribers in markets where two Canadian and three US commercial channels were available on cable, whether or not these US channels were also available off-air.

Table 7 shows the audience shares of Canadian and US channels in four such markets including Kelowna. On the average, Canadian channels attracted an audience share of only 46.75 per cent.

TABLE 7

AUDIENCE SHARE AMONG CABLE SUBSCRIBERS
(Two Canadian and Three US Commercial Channels)

BBM No.	Market	Audience Share of:		US Channels Carried by Cable*
		Canadian Stations %	US Stations %	
9079	Chilliwack	49	52	CBS, NBC, ABC, PBS
9109	Vancouver	42	58	CBS, NBC, ABC, PBS
9139	Nanaimo	43	57	CBS, NBC, ABC, PBS
9229	Kelowna	53	47	CBS, NBC, ABC
Average		46.75	53.25	

Source: BBM January 1976 Audience Survey.

- * Although in the first three markets an independent US channel was also available on cable, its technical quality was so poor that its audience share was only 2 per cent in Chilliwack, 1 per cent in Vancouver, and 0 per cent in Nanimo.

Thus, where three US commercial stations become available by cable in a market in which there are two Canadian stations, the US stations typically obtain 53 per cent of the audience.

3. Impact of New Canadian Television Services

a. Licensing of a New Independent Station: Edmonton

Not only are the audiences of existing Canadian stations fragmented by the US stations, they are equally fragmented by new Canadian independent stations.

Table 8 shows the audience shares of Canadian and US stations among cable subscribers in Edmonton before and after the introduction of CITV, a new Canadian independent station. CITV obtained 24.8 per cent, almost a quarter of the total audience (larger than 19.1 per cent, the share of the CBC station). The combined share of CBC and CTV stations dropped from 73.3 to 53.8 per cent for a percentage loss of 26.6 as against a loss of 18.9 per cent for the US stations.

It is to be noted that the independent station obtained almost a third of the total audience for the three Canadian stations (CBC, CTV, CITV).

b. Importation of an Existing Independent Station to a Distant Market: Sudbury

Table 9 shows the audience shares of different types of stations among off-air and cable viewers in Sudbury for an average week in November 1977, when Global and WIVB, a US station, were first reported for the Sudbury market; both stations were microwaved. Among cable subscribers, Global attracted just as much audience (a share of 14.5 per cent) as the US station (a share of 14.3 per cent). Each of the CBC and CTV stations attracted a much smaller audience share among cable viewers than among off-air viewers: a combined share of only 66.4 per cent among cable viewer compared to a share of 96.9 per cent among off-air viewers.

4. CONCLUSIONS

1. In spite of an increase in the number of Canadian television stations, their audience share, over the decade, declined from 74.12 to 69.53 per cent for English-language stations in English-speaking Canada and 80.07 to 74.30 per cent for French-language stations in Québec; the share of US stations increased correspondingly from 24.28 to 29.19 per cent in English-speaking Canada and 3.79 to 8.84 per cent in Québec. It should however be noted that these absolute losses in shares are minimized to the extent that factors like population increases contribute to the total hours tuned to television.

2. Among Canadian stations, the biggest losers were the CBC and Radio-Canada privately-owned affiliated stations; the audience share of CBC affiliates, in English-speaking Canada, dropped from 30.12 to 11.07 per cent and that of Radio-Canada affiliates in Québec, from 22.43 to 14 per cent.

TABLE 8
AUDIENCE SHARE AMONG CABLE SUBSCRIBERS
BY CATEGORY OF STATION

Average Week
November 1973 - November 1974
(before and after the introduction of new
Canadian independent station)

Edmonton, Alberta

Category of Station	Nov. 1973 %	Nov. 1974 %	Percentage Change
CBC-owned English CBXT Edmonton	25.0	19.1	- 23.6
CBC-affiliated English CKRD Red Deer	- .6	.5	- 16.6
CBC-owned French CBXFT Edmonton	*	.5	
CTV CFRN Edmonton	47.7	33.7	- 29.2
Total - CBC and CTV Stations	73.3	53.8	- 26.6
US Stations KHQ Spokane	24.7	19.6	- 19.3
Other US	1.5	1.8	20.0
Total US	26.4	21.4	- 18.9
Independent English CITV Edmonton		24.8	
Total - All Stations	100.0	100.00	

Source: BBM Audience Surveys, November 1973 and November 1974.

* Less than .5 per cent.

TABLE 9

AUDIENCE SHARE AMONG OFF-AIR AND
CABLE VIEWERS BY CATEGORY OF STATION

Average Week, November 1977

Sudbury, Ontario

Category of Station	Viewing off-air	Viewing via Cable	Percentage Difference
CBC-affiliated English CKNC North Bay	43.7	29.8	-31.8
CTV CKSO Sudbury	53.2	36.6	-31.2
Total CBC and CTV stations	96.9	66.4	-30.6
GLOBAL	-	14.5	-
US WIVB Buffalo	-	14.3	-
Others*	3.1	4.8	-
Total	100	100	

Source: BBM Audience Survey, November 1977.

* Others include CBFST, CBLFT (the French-language stations) and TVO, an educational station.

3. The audience share of Canadian independent stations including Global, in English-speaking Canada, increased from 3.72 per cent in 1967 to 14.39 per cent in 1977. This was mostly at the expense of CBC owned-and-operated and affiliated stations.

4. The impact of cable television, in terms of audience fragmentation, is felt most in markets where US stations are not available off-air. In fact, in Ontario and British Columbia, where US stations have always been available off-air, the share of US stations declined very slightly; in every other province, the audience share increased quite significantly, directly as a result of increase in cable

penetration. For instance, in Nova Scotia the share of US stations increased from 0 to 15.69 per cent with increase in cable penetration from 0 to only 32.3 per cent; further increase could be expected in the share of US stations as cable penetration increases.

5. When two US stations are imported by cable in a market which has two Canadian stations and no US stations available off-air, the audience share of Canadian stations among cable subscribers typically drops from 100 per cent to 60 per cent.

6. When three US stations are carried by cable in a market where there are two Canadian stations, the audience share for the US stations among cable subscribers is typically 60 per cent. This is contrary to the widely held belief that additional US stations will mainly cut into the audiences of other US stations.

7. Furthermore, there is no evidence that importation of additional (fourth or fifth) nonduplicative US channels will cause any less fragmentation to the Canadian channels than do the other existing US channels.*

8. The major increase in cable penetration, over the decade, was in markets where US stations were also available off-air and the overall impact of cable on audience fragmentation, though significant, was not to the extent generally believed. It is important to recognize, however, that the future increase in cable penetration will be in areas where US stations are generally not available off-air and the impact of cable, in terms of audience fragmentation, will be much more severe than has been the case so far. Unlike the richer markets near the border, many of the local Canadian stations in these markets are already having financial problems and any audience fragmentation is likely to threaten the economic survival of these stations.

9. Licencing of new independent stations, or the importation of existing ones in markets where they are not currently available, will significantly fragment the audiences of existing Canadian stations in those markets.

* CRTC Internal Document, "The Impact of the Satellite Distribution of American Television Stations on the Canadian Broadcasting System," Chapter I, Audience Share Distribution Between Canadian and American Channels - A Statistical Model (December 1977).

E. TELEVISION AUDIENCE PATTERNS IN CANADA

1. Statistical Base for Analysis

The problem of analyzing the distribution of and reasons for audience preferences in watching television is more complex than that of making up one's mind when about to shake hands with an octopus, for there are more dimensions involved than can conveniently be illustrated in tabular or graphic form, particularly if their interrelationships are to be taken into account.

In the statistical base on which this analysis is founded, the figures relate only to the viewing of all programs broadcast between 6 pm and midnight (referred to as prime time) by all television stations which are accessible in Canada, Canadian and foreign, whether off-air or by cable reception. Viewing time is measured in terms of audience hours for a particular type of station or category of program. The figures have been developed on the basis of the BBM surveys covering 30 October to 12 November 1967, and 8 to 21 November 1976. The methodology followed is described in more detail in Appendix I.

The statistics have been broken down in two principal ways: a distinction is made throughout between English-language and French-language stations; and programs are classed by content categories, distribution categories, and country of origin.

Within the two classes of station distinguished by language of programming, English and French, further breakdowns have been made as follows:

a. English-language stations:

- i. CBC-O - stations owned-and-operated by the CBC
- ii. CBC-A - private stations affiliated to the CBC network
- iii. CTV - stations affiliated to the CTV network
- iv. Can.Ind.- stations not affiliated to the CBC or CTV networks, including Global
- v. US - all US stations receivable in Canada off-air or by cable

b. French-language stations:

- i. R.-C.-0 - stations owned-and-operated by Radio-Canada)
- ii. R.-C.-A - private stations affiliated to the Radio-Canada network
- iii. TVA - 1967: three independent stations, since associated with the TVA network
1977: stations associated with the TVA network.

In discussing television options available to Canadian audiences, the Canadian educational stations (TVOntario and Radio-Québec) and PBS in the US have been included, but they have not been separated out here because they are too recent in origin to provide any comparative figures over the period reviewed, and their respective audience shares are still so small as to be insignificant in the immediate context. They do, however, afford an additional viewing option that may prove increasingly attractive in the future.

Although separate figures are available for the three US commercial networks, and for US independent stations, their respective shares of Canadian audiences do not matter very much. What is important is the total US share in relation to the shares of Canadian stations, and they are therefore treated as a single group for the purposes of this present analysis.

In classifying programs, no fewer than 12 distinctions are made in three groups, as follows:

a. Content categories:

- i. News
- ii. Current affairs
- iii. Information (consumer, market, agriculture, etc.)
- iv. Sports
- v. Entertainment
- vi. Other

b. Distribution categories:

- i. Local - programs produced locally and scheduled by individual stations
- ii. Network - programs scheduled by a network
- iii. Other - all other programs, referred to as syndicated programs

c. Country of origin:

- i. Canada
- ii. US
- iii. Other.

The process of simplifying these statistical matrices into statements that a layman might reasonably be expected to be able to digest fairly quickly necessarily entails some further minor obscurities. For instance, some programs may fall between two categories, e.g. current affairs and information, and must be arbitrarily assigned to one or the other rather than to others. In the distribution categories, network programs will include some locally produced programs as well as those produced by the network itself or procured from independent sources, including films.*

As regards country of origin, for all practical purposes it may be assumed that other means the UK for English-language programs. For French-language programs, however, it cannot be assumed that other means only France.

Furthermore, English and French are not the only two languages used in Canadian programming: the CBC does a certain amount of programming in the native languages, and some private stations provide part-time programming in the language of particular local ethnic communities, a trend that is likely to increase as more cable channels become available. It would be a mistake to ignore these elements in the general pattern of Canadian programming, but they are necessarily disregarded in this analysis, and in the background statistics, because their shares of audiences are statistically insignificant.

The following sections deal with Canadian audiences for Canadian and foreign stations; the types of program viewed by Canadian audiences, and their Canadian or foreign origins; and audience shares by type of Canadian station.

* Appendix IV contains a listing of network programs by category and country of origin so that readers can have some feel for the use of categories and additional insight into resulting viewing patterns.

2. Canadian and US Stations Viewed by Canadians
(Prime Time)

Between 1967 and 1977, Canadian viewing of US stations in prime time increased from 21.65 to 25.12 per cent of the total audience for English-language television stations. Table 10 sets out some of the relevant figures. The same information for English-speaking Canada is shown in Table 11.

It is undeniable that as coverage expands in areas where US signals are not available off-air, more people will be able to watch US stations if they wish to, and many of them will. But most of them are no more likely to abandon watching Canadian stations altogether than those who already have access to US stations. A further decline in audiences for Canadian stations is unavoidable, and it will aggravate the problem of audience fragmentation, as already demonstrated.

TABLE 10

AVAILABILITY AND AUDIENCE SHARE OF US STATIONS

Canada - 1967-1977

% of Population Having Access to US Channels

	1967	1977
1 US channel	48.75	70.62
2 US channels	37.46	64.92
3 US channels	30.39	54.20
Audience share		
US stations:	15.86	19.09
(prime time)		

TABLE 11

AVAILABILITY AND AUDIENCE SHARE OF US STATIONS

English-speaking Canada - 1967-1977

% of Population Having Access to US Channels

	1967	1977
1 US channel	56.70	78.23
2 US channels	44.07	73.10
3 US channels	39.43	61.96
Audience share		
US stations:	21.65	25.12
(prime time)		

3. Audience Shares by Program Category

a. English-language Stations

What do Canadians actually watch on television? Table 12 shows that about three-quarters of their viewing time is addressed to entertainment programs.

TABLE 12

DISTRIBUTION OF VIEWING TIME

English-language Television - Canadian and US Stations
(Prime time)

	1967 %	1972 %	1976 %
News	8.75	12.69	12.50
Current affairs	5.20	3.44	4.50
Information	0.07	0.25	1.28
Sports*	6.68	6.03	5.80
Entertainment	78.38	77.33	75.90
Other	0.92	0.26	0.10
	100.00	100.00	100.00

* Figures for the sports category are not very informative, for the survey base from 6 pm to midnight eliminates the huge audience share for sports on Saturday and Sunday afternoons.

A notable feature of Table 12 is that entertainment programming still monopolizes the viewing time. If sports is perceived as entertainment, then the viewing share of entertainment programs exceeds 80 per cent. In 1967 it was 85.06 per cent and fell slightly to 81.70 per cent by 1976. This tends to confirm reports of a general kind from the US, and the reason may be that television is such a voracious consumer of talent and ideas that it becomes increasingly difficult to maintain audience interest.

Another interesting feature of Table 12 is the sharp rise in audiences for news programs between 1967 and 1972, when they more or less settled at the much higher level. Meanwhile, interest in current affairs dropped sharply in the first five years but recovered much of the lost ground

in the second. Although the percentages for information are relatively insignificant, 18 times as many people were interested in 1976 as in 1967. An undoubted trend towards viewing more serious types of programming is shown if the three categories of news, current affairs, and information are combined, for it will be seen that their aggregate audience share rose steadily from 14.02 per cent in 1967 to 16.38 per cent in 1972, and again to 18.28 per cent by 1976. This feature of the trend in audience patterns is of greater importance in the examination of the country of origin of different types of programming.

b. French-language Stations

Audiences for French-language television stations have preferences similar to those for English-language television stations. Table 13 shows that entertainment is likewise the dominant category although it rose and fell over the decade from 71.26 per cent in 1967 to 76.11 per cent in 1972 and 67.72 per cent in 1976. This share however, remained lower than that for English-language stations.

TABLE 13
DISTRIBUTION OF VIEWING TIME
French-language Television
(prime time)

	1967 %	1972 %	1976 %
News	10.70	13.39	10.06
Current Affairs	7.68	4.20	5.37
Information	0.53	0.00	1.66
Sports*	6.70	6.29	15.18
Entertainment	71.26	76.11	67.72
Other	3.12	0.00	0.00
	100.00	100.00	100.00

- * The viewing share for sports programming showed an unusually large percentage increase in 1976 but this may be accounted for by a special sporting event. It should also be noted that the survey base from 6 pm to midnight eliminates the huge audience share for sports on Saturday and Sunday afternoons.

Unlike the viewing of English-language stations, the viewing of news remained constant. Current affairs however declined from 7.68 per cent in 1967 to 5.37 per cent in 1976 while the viewing of information programs more than trebled. Overall though, the share for news, current affairs, and information, combined, remained roughly constant.

c. CONCLUSIONS

1. Although new Canadian stations have been licensed, the Canadian viewing of US stations in prime time (6 pm to midnight) has increased from 21.65 to 25.12 per cent of the total viewing of English-language stations.
2. Entertainment programming dominates the viewing of English-language stations. In 1976, 75.90 per cent of this viewing was devoted to entertainment programs. If sports is included as entertainment the share exceeds 80 per cent.
3. Another major trend in the viewing of English-language stations is the increase in the share of news from 8.75 per cent in 1967 to 12.50 per cent in 1976. This largely reflects the increasing programming effort and popularity of the early evening local and regional news.
4. Entertainment also dominated the viewing of French-language stations. Ignoring the unusually high viewing share for sports in 1976, news programs were the next most popular French-language programs and amounted to 10.06 per cent of the viewing in 1976.

4. Audience Shares for Canadian and Foreign Programs

a. Canadian Content in Prime Time

Prior to examining the viewing shares of Canadian as opposed to foreign programs, it is useful to consider a factor affecting the extent to which Canadian programs are scheduled in prime time, i.e. regulation with respect to Canadian content. As it stands, this regulation requires all stations to have 60 per cent Canadian content in the period between 6 am and midnight, calculated on an annual basis. In addition, stations owned-and-operated by the CBC must have 60 per cent Canadian content between 6 pm and midnight. Privately-owned stations must have 50 per cent Canadian content between 6 pm and midnight. Before 1970 the regulations required less Canadian content although the rule had to be met in each quarter of the year. All stations had 55 per cent Canadian programming over the full day with 40 per cent

required between 6 pm and midnight (an allowance was included for Commonwealth programs, specials, and the World Series). In terms of what constitutes a Canadian program, the rules are not restrictive. Co-productions for example, where financial or production elements are supplied by another country, have been qualified as Canadian. Furthermore, foreign programs dubbed in Canada into either of the two official languages are assigned 25 per cent Canadian content.

The design of clear quantitative rules has followed from the objective in the Broadcasting Act that "the programming provided by each broadcaster should be of high standard, using predominantly Canadian creative and other resources" (Section 3 (d)); and they were created in the expectation that quality Canadian programming would result. If it is also assumed that the intention of the regulation is not simply that Canadian programs exist, but that they should be viewed, then there are problems, because while the rules have on the whole been observed, they have not been effective in achieving the scheduling of Canadian programs in peak viewing hours. Table 14 demonstrates that between 8 pm and 10:30 pm, which is peak viewing time for television, most private Canadian networks and stations schedule programming which is not Canadian.

b. English-language Stations

Much of the alarm and despondency about the intrusion of American "culture" arises from the fact that, in 1967 and 1976, more than 70 per cent of all the programming viewed by Canadian audiences for English-language stations was of foreign origin (Table 15). Examination of the audience shares for different program categories reveals an important conclusion, for the attraction of foreign programming is highest by far in the entertainment category, which attracts over three-quarters of the audience for English-language stations, Canadian and US.

The attractiveness of foreign entertainment programs is not really a matter for surprise. The population of the United States is about 10 times that of Canada, and so, presumably, the pool of talent is also 10 times as large. Not all foreign English-language programming originates in the United States, and top-class British entertainment also attracts large audiences. Both the United States and Britain, in comparison to Canada, have larger and older

TABLE 14
CANADIAN CONTENT IN PEAK VIEWING TIME
(8 to 10:30 pm)

Station	Per cent Canadian content 8 to 10:30 pm		
	1967-68	1977-78	1978-79
CBC English	45.7	71.4	68.5
Radio-Canada	67.1	74.2	71.4
CTV	22.8	11.4	5.7
TVA (CFTM)	38.5	34.2	28.5
Global (CKGN)	-	51.4	22.8
CHCH Hamilton	20	17.1	22.8
CITY Toronto	-	28.5	40
CKND Winnipeg	-	28.5	28.5
CFAC Calgary	-	22.8	22.8
CITV Edmonton	-	17.1	22.8
CKVU Vancouver	-	31.4	25.7

Source: Station and network schedules.

entertainment structures and facilities, and larger audiences. It follows that one Canadian entertainment feature in 10 may emerge as a qualitative competitor, and progress towards a better ratio will necessarily be slow.

The economics of television program production are governed by the fact that the costs (at any particular time) are constant, regardless of the size of the audience, and the potential US audience is 10 times as large as the potential Canadian audience. Thus a US producer can afford to spend \$200,000 on a half-hour program in the knowledge that he may sell it profitably to one or other of the US networks; the foreign rights thus provide extra revenues and can be sold, country by country, for say \$8,000. A Canadian broadcaster, by spending \$8,000 on a foreign program that is certain to attract a large share of the total audience, can set advertising rates that will bring in revenue of say \$40,000. Production costs at the US level are, for the most part, not feasible for Canadian producers. In the effort to compete in a film drama, perhaps as much as \$100,000 may be invested, but lower advertising rates, which are inevitable, would bring in only \$25,000 in revenue, leaving a net loss of about \$75,000. Thus a Canadian broadcaster who is dependent

TABLE 15

PERCENTAGE DISTRIBUTION OF VIEWING TIME

ENGLISH-LANGUAGE TV STATIONS

All English TV Stations

1967

Program Category	Origin of Program			Total
	Canadian	Foreign		
1. News	7.57	1.18		8.75
2. Current Affairs	4.88	0.32		5.20
3. Information	0.07	0.00		0.07
4. Sports	6.47	0.20		6.68
5. Entertainment	9.60	68.78		78.38
6. Other	.48	.44		.92
Total	29.07	70.93		100.00

1972

Program Category	Origin of Program			Total
	Canadian	Foreign		
1. News	11.30	1.39		12.69
2. Current Affairs	3.41	0.03		3.44
3. Information	0.25	0.00		0.25
4. Sports	5.17	0.86		6.03
5. Entertainment	14.22	63.11		77.33
6. Other	0.06	0.20		0.26
Total	34.41	65.59		100.00

1976

Program Category	Origin of Program			Total
	Canadian	Foreign		
1. News	11.20	1.30		12.50
2. Current Affairs	4.30	0.20		4.50
3. Information	1.28	0.00		1.28
4. Sports	4.30	1.50		5.80
5. Entertainment	7.70	68.20		75.90
6. Other	0.10	0.00		0.10
Total	28.90	71.10		100.00
100% - viewing hrs. of all English-language TV stations.				

All French TV Stations

1967

Program Category	Origin of Program			Total
	Canadian	Foreign		
1. News	10.70	0.00		10.70
2. Current Affairs	7.68	0.00		7.68
3. Information	0.53	0.00		0.53
4. Sports	6.70	0.00		6.70
5. Entertainment	32.21	39.05		71.26
6. Other	0.86	2.27		3.12
Total	58.69	41.31		100.00

FRENCH-LANGUAGE TV STATIONS

1972

Program Category	Origin of Program			Total
	Canadian	Foreign		
1. News	13.39	0.00		13.39
2. Current Affairs	4.20	0.00		4.20
3. Information	0.00	0.00		0.00
4. Sports	6.29	0.00		6.29
5. Entertainment	42.46	33.65		76.11
6. Other	0.00	0.00		0.00
Total	66.35	33.65		100.00

1976

Program Category	Origin of Program			Total
	Canadian	Foreign		
1. News	10.06	0.00		10.06
2. Current Affairs	5.21	0.16		5.37
3. Information	1.66	0.00		1.66
4. Sports	15.18	0.00		15.18
5. Entertainment	32.67	35.06		67.72
6. Other	0.00	0.00		0.00
Total	64.78	35.22		100.00
100% - viewing hrs. of all French-language TV stations.				

on advertising revenue, whether in whole for the private sector or in part for the CBC, can only afford to schedule a Canadian production in prime time if he also schedules the more attractive US features, so that there is a practical limit to prime-time Canadian-content requirements if Canadian broadcasters are to be able to survive.

Table 15 shows that the audience share for entertainment declined marginally from 1967 to 1976, but still remained at almost 76 per cent. The proportion of foreign programs in this category also declined slightly from 68.78 per cent in 1967 to 68.20 per cent in 1976. But this was not a steady decline, for in 1972 the foreign element dropped to 63.11 per cent.

Three program categories that are very important in relation to the Broadcasting Act's requirement "to safeguard, enrich and strengthen the cultural, political, social and economic fabric of Canada" are news, current affairs, and information. The aggregate audience share for these categories rose sharply between 1967 and 1972 and was maintained at this higher level in 1976. Within this increased share of the total audience, there has been a solid rise in the already high proportion of Canadian programs viewed, as shown in Table 15.

c. French-language Stations

The most significant difference between English- and French-speaking audiences in viewing patterns is the much higher share for Canadian programs on French-language stations. In 1967 it was 58.69 per cent and by 1976 it had increased to 64.78 per cent (Table 15). In examining Canadian programs by category, another contrast emerges and that is that Canadian French-language entertainment programs are much more popular than their English-language counterparts. Unlike Canadian entertainment programs produced by English-language stations, those on the French-language stations attain a share nearly equal to the foreign entertainment programs shown on the same stations and furthermore, they have not declined in viewing share while those on English-language stations have. In 1967, their share was 32.21 per cent and in 1976 it was approximately the same at 32.67 per cent (Table 15).

d. CONCLUSIONS

1. It is undeniable that Canadian viewers predominantly watch programming in the entertainment category and the origin of the programming to the viewer seems to be of little or no significance. Throughout the period reviewed, roughly 70 per cent of all English-language programming viewed in Canada was of foreign origin. Almost all of it was in the entertainment category (96 per cent in 1976). This programming is overwhelmingly of US origin.

2. In the English-language entertainment category the total audience share for Canadian programs rose from 9.60 per cent to 14.22 per cent between 1967 and 1972 but then fell to 7.71 per cent in 1976. In total, however, of the English-language programming viewed in Canada in 1976, 76 per cent was in the entertainment category and if sports were included, over 80 per cent of programming viewed was in those two categories.

3. In the French-language entertainment category, the total audience share for Canadian programs rose from 32.21 per cent to 42.46 per cent between 1967 and 1972 but then fell back to 1967 level in 1976. As with English-language programming the viewing is dominated by entertainment programs. The total share of French-language entertainment programs accounted for 67.72 per cent of the viewing in 1976 and would exceed 80 per cent if sports were included.

4. Throughout the decade the percentage of Canadian programming of French-language programs increased from 58.69 per cent to 64.78 per cent.

5. While the regulations on Canadian content ensure that programming over the whole day and in prime time is predominantly Canadian, on private stations the proportion of Canadian programs is far less in the peak viewing period from 8 to 10:30 pm. It is significant that in the smaller French-language market, even accepting the important differences in the competitive environment, the Canadian formats for French-language programming have proven to be enormously popular in peak viewing hours.

5. Audience Shares of Canadian Networks and Stations

a. English-language Networks and Stations

i. General

The distinction between the public and private television sectors is not clear cut, for the stations affiliated to the CBC network straddle the fence; when not showing CBC network programming, they constitute an element of the private sector. The figures have been assembled on the following basis:

Public sector:	CBC	- the CBC network
	CBC-O	- CBC owned-and-operated stations, non-network programming
Private sector:	CBC-A	- privately owned affiliates of the CBC network, non-network programming
	CTV	- the CTV network
	CTV-A	- affiliates of the CTV network, non-network programming
	Ind.	- all Canadian independent stations, including Global.

To set a perspective, Table 16 shows the distribution of the total audience for English-language networks and stations between the Canadian public and private sectors and US stations. The figures in brackets show the audience share for Canadian programming within the totals. It demonstrates that although the US stations have made a small overall increase as already discussed, the major realignment in audience shares has been the loss of the Canadian public sector to the Canadian private sector. The public sector declined from 34.61 per cent in 1967 to 22.57 per cent in 1976 while the private increased from 43.75 per cent to 52.31 per cent. Within the Canadian private sector the losses were shown by the CBC affiliates in their non-network capacity while the gains accrued to the CTV affiliates in their non-network capacity, and to independent stations. A very important finding is that the overall share attained by Canadian programs remained constant at 29 per cent.

However, it is important to underline that in 1976, of the audience share of the public sector, the audience share for Canadian programming is a significant 56 per cent while the corresponding audience share for Canadian programming in the private sector is 30.9 per cent (up from 25 per cent in 1967).

TABLE 16

AUDIENCE SHARES FOR ENGLISH-LANGUAGE NETWORKS AND STATIONS
(prime time)

	1967		1972		1976	
	%	%	%	%	%	%
CBC	29.61	(14.67)	25.00	(12.91)	18.05	(9.79)
CBC-0	5.00	(3.38)	5.59	(4.08)	4.52	(2.87)
Canadian						
Public sector	34.61	(18.05)	30.59	(16.99)	22.57	(12.66)
CBC-A	15.56	(3.64)	9.17	(2.96)	6.96	(2.24)
CTV	20.01	(4.15)	19.14	(6.89)	21.12	(3.88)
CTV-A	4.68	(2.49)	13.50	(6.19)	11.08	(6.94)
Independent						
Canadian	3.50	(0.74)	5.19	(1.38)	13.15	(3.14)
Private sector	43.75	(11.02)	47.00	(17.42)	52.31	(16.20)
All Canadian						
stations	78.36	(29.07)	77.59	(34.41)	74.88	(28.86)
US stations	21.65		22.40		25.12	
	100.00		100.00		100.00	

() Audience share for Canadian programming.

The entertainment category of programming takes such a preponderant share of the total audience that it is instructive to take a look at the trends for the Canadian public and private sectors in the categories of entertainment, news, and current affairs and information.

The sports category may be disregarded, because the data apply only to the period from 6 pm to midnight, and take no account of the large audience share on Saturday and Sunday afternoons. However if sports were essentially entertainment it would again reinforce the dominance of the entertainment category.

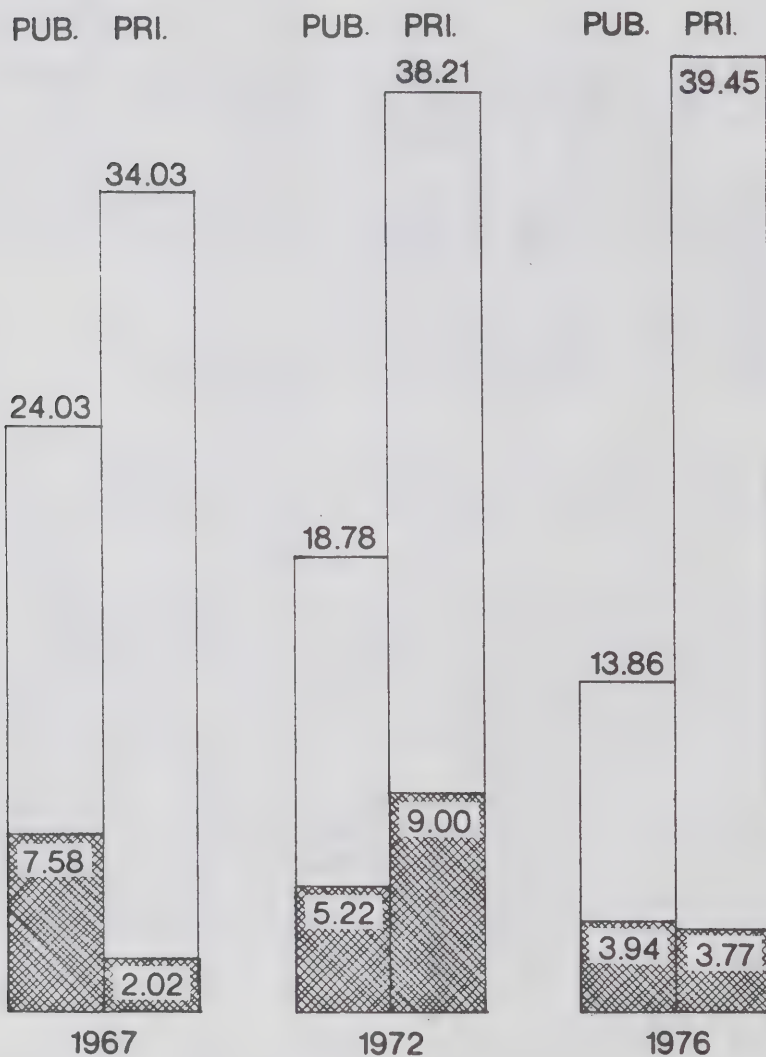
ii. Entertainment

Figure F reveals that in entertainment programming, the audience share for the public sector has been steadily dwindling away while that of the private sector has shown a small gain. Particularly striking is the fact that, whereas in 1967 the public sector drew a much larger share for its Canadian programming than the private sector, the latter had achieved almost an equal share by 1976.

FIGURE F

AUDIENCE SHARE FOR ENTERTAINEMENT CANADIAN PUBLIC AND PRIVATE SECTORS % OF TOTAL AUDIENCE

Canadian programming



iii. News

Table 17 shows that the private sector has been gaining ground over the public sector; the programming is all Canadian for both. It is satisfactory that the audience share for Canadian news programs, in total, has increased substantially over the decade (from 7.57 to 11.25 per cent).

An interesting trend appears from a different analysis of these figures. The total audience share for network news, CBC and CTV together, increased only very slightly from 1.98 to 2.34 per cent. But the share for local and regional news rose sharply from 5.59 per cent in 1967 to 9.19 per cent in 1972, and was maintained almost at that level, 8.91 per cent, in 1976. The inference is that Canadians are much more interested in regional and local news than they used to be and that regional and local news has taken on an increased and important dimension, especially with respect to CTV and its affiliates.

TABLE 17

AUDIENCE SHARE FOR NEWS PROGRAMS
English-language Networks and Stations

	1967 %	1972 %	1976 %
CBC	1.44	1.76	1.26
CBC-0	1.73	3.08	1.37
Canadian public sector	3.17	4.84	2.63
CBC-A	2.39	1.83	1.81
CTV	0.54	0.36	1.08
CTV-A	1.36	3.93	4.46
Independent	0.11	0.35	1.27
Canadian private sector	4.40	6.47	8.62
All Canadian stations	7.57	11.31	11.25
US stations	1.18	1.38	1.25
Total share for news	8.75	12.69	12.50

iv. Current Affairs and Information

Table 18 shows that the aggregate audience share for these categories dropped sharply between 1967 and 1972 but then recovered to nearly 6 per cent. The share for the public sector remains at about three-fifths of the total. The programming by Canadian networks and stations is almost entirely Canadian in origin.

TABLE 18

AUDIENCE SHARES FOR CURRENT AFFAIRS AND INFORMATION PROGRAMS
English-language Networks and Stations

	1967 %	1972 %	1976 %
Canadian public sector	3.05	2.46	3.22
Canadian private sector	1.97	1.21	2.30
All Canadian stations	5.02	3.67	5.52
US stations	0.24	0.03	0.21
Total audience share	5.26	3.70	5.78

b. French-language Television Networks and Stations

In 1967, there were three independent French-language television stations in Québec; they joined the TVA network when it was formed later, and there are now no independent stations. The components of the French-language public and private sectors are:

- Public sector: R.-C. - the Radio-Canada network
- R.-C.-0 - Radio-Canada owned-and-operated stations, non-network programming
- Private sector: R.-C.-A - Radio-Canada affiliated stations, non-network programming
- TVA - TVA network programming
- TVA-A - TVA associated stations, non-network programming
- Ind. - Canadian independent French-language stations.

Table 19 shows that the audience share of the public sector dropped slightly from 43.34 per cent in 1967 to 40.21 per cent in 1976. The figures are, of course, reflected reciprocally in the share for the private sector, which rose from about 57 per cent in 1967 to almost 60 per cent in 1976. What is striking, however, are the dramatic changes in audience shares for Canadian programming. The public sector suffered a slight decline in the share for Canadian programming from 28.76 per cent in 1967 to 25.89 per cent in 1976, but the private sector increased from 29.93 per cent in 1967 to 38.89 per cent in 1976, for a proportionate gain of 30 per cent. Another way of stating this important finding is that as a per cent of the total viewing share of the private sector, the share for Canadian programs increased from 52.82 per cent in 1967 to 65.06 per cent in 1976, which contrasts sharply with the equivalent figure of 30.9 per cent for English-language private television. The net result for all French-language viewing was an increase in the Canadian program share from 58.69 per cent in 1967 to 64.78 per cent in 1976, which also contrasts with the share of 29 per cent obtained by Canadian English-language programs at the beginning and the end of the decade.

TABLE 19

AUDIENCE SHARES FOR FRENCH-LANGUAGE NETWORKS AND STATIONS
(prime time)

	1967		1972		1976	
	%	%	%	%	%	%
R.-C.	42.05	(27.53)	38.57	(27.23)	37.62	(23.97)
R.-C.-0	1.29	(1.23)	6.25	(5.29)	2.59	(1.92)
Public sector	43.34	(28.76)	44.82	(32.53)	40.21	(25.89)
R.-C.-A	12.67	(7.23)	4.53	(2.78)	4.12	(2.15)
TVA	-		40.95	(25.93)	31.09	(25.76)
TVA-A	-		9.70	(5.11)	24.57	(10.98)
Independent	43.99	(22.70)	-		-	
Private sector	56.66	(29.93)	55.18	(33.82)	59.78	(38.89)

() Audience shares for Canadian programming.

In Table 20, the audience shares for entertainment programming have been separated out. Here the public sector has held its ground at about 28 per cent, but the private sector lost substantially by 1976, carrying almost all the loss of entertainment viewing as a whole. It is noteworthy that the Canadian programming of the private sector attracts a substantially higher share of the total viewing audience than that of the public sector in the entertainment category.

TABLE 20
AUDIENCE SHARES FOR FRENCH-LANGUAGE ENTERTAINMENT PROGRAMMING
(prime time)

	1967		1972		1976	
	%	%	%	%	%	%
R.-C.	27.16	(14.04)	27.66	(16.32)	27.08	(13.59)
R.-C.-O	0.07	(0.02)	1.58	(0.62)	0.74	(0.07)
Public sector	27.23	(14.06)	29.24	(16.94)	27.82	(13.66)
R.-C.-A	8.96	(4.05)	2.99	(1.24)	3.00	(1.03)
TVA	-		37.80	(22.78)	16.50	(11.17)
TVA-A and Ind.	35.06	(14.11)	6.09	(1.50)	20.40	(6.81)
Private sector	44.02	(18.16)	46.88	(25.52)	39.90	(19.01)

() Audience shares for Canadian programming.

Table 21 shows the audience distribution for the news, current affairs, and information categories taken together; the content is virtually all Canadian.

In contrast to the figures for English-language programming in these three categories, there has been no similar rise in the audience for news programs. Another point of difference is that the network programming, Radio-Canada and TVA together, in the group increased from 8.05 per cent in 1972 to 10.10 per cent in 1976, while the share of the stations' non-network programs fell from 8.13 to 5.89 per cent in the same period, exactly opposite to the trend experienced by the English-language networks and stations.

TABLE 21

AUDIENCE SHARES FOR FRENCH-LANGUAGE NEWS, CURRENT AFFAIRS,
AND INFORMATION PROGRAMS
(prime time)

	1967 %	1972 %	1976 %
R.-C.	6.34	5.61	6.48
R.-C.-O	1.17	4.55	1.81
Public sector	7.51	10.16	8.29
R.-C.-A	2.81	1.42	1.13
TVA	-	2.44	3.62
TVA-A	-	3.58	4.08
Independent	8.58	-	-
Private sector	11.39	7.44	8.83

c. CONCLUSIONS*

English-language Television

1. The public sector, the CBC network and owned-and-operated stations, had an audience share of 34.61 per cent in 1967, 30.59 per cent in 1972, and only 22.5 per cent in 1976. Correspondingly the audience share for the private sector rose from 43.75 per cent to 47 per cent between 1967 and 1972 and to 52.31 per cent in 1976.

2. In total the audience share for Canadian programs remained constant at 29 per cent. Whether or not this should be considered an achievement or a failure is, considering all factors, debatable.

3. Whereas in 1967 the Canadian programming of the public sector attracted an audience half as large again as the private sector, the latter caught up by 1972 and was well

* These statistical conclusions are based on prime time. It remains for further analysis to determine if the audience shares would change in analyzing the full daily schedule.

in the lead in 1976 with 16.20 per cent compared with 12.66 per cent for the public sector. However, as a percentage of the overall audience, the public sector audience share for Canadian programming was at 56 per cent in 1976, while at 30.9 per cent in the private sector.

4. In the entertainment category of Canadian programming, the private sector now attracts almost exactly the same share of audience as the public sector.

5. The audience share of the public sector for news fell during the period from 3.17 to 2.63 per cent, while that of the private sector rose from 4.40 to 8.62 per cent. Analysis of the increased total audience for news indicates that Canadians have an increased interest in regional and local news.

6. Current affairs and information programs, despite a drop in 1972, continue to attract an audience share of over 5 per cent; there has been no significant shift between the public and private sectors, about three-fifths of the programming being supplied by the public sector.

French-language Television

1. With French-language television, Canadian programs obtained a higher share than their English-language equivalents and furthermore, this share increased. In 1967 the viewing share for Canadian French-language programs was 58.69 per cent while in 1976 it was 64.78 per cent.

2. In terms of overall audience shares, Radio-Canada lost slightly while the private sector made a slight gain but in terms of Canadian programming, the contrast is dramatic. The audience share for Canadian programs televised by the public sector declined slightly from a 28.76 per cent share in 1967 to 25.89 per cent in 1976 while the private sector increased from 29.93 per cent to 38.89 per cent, for a proportionate increase of 30 per cent.

III. RADIO

A. COVERAGE AND OPTIONS

Radio was already well-established in Canada in 1967. Virtually everyone could receive at least three radio stations in 1967, while two-thirds of the population could receive nine or more stations. In 1977, more than four-fifths could receive nine or more.* Now 60 per cent of the people in Ontario, and a few in Alberta and British Columbia, can receive as many as 15. On the other hand half the population of Prince Edward Island receives no more than five stations, and two-thirds of the population of New Brunswick receives no more than six stations. It should, however, be pointed out that the average listener - regardless of the choice available to him or her - tunes into fewer than three stations in the course of an average week.

Considerations applicable to radio data are rather different from those that apply to television data. First, a distinction must be made between Amplitude Modulation (AM) and Frequency Modulation (FM) stations. Second, Canadian coverage by US stations is relatively unimportant. Third, extension of coverage by cable systems is not a factor, except to a small extent for FM stations, which generally speaking have a much shorter range than AM stations. Fourth, a few stations broadcast in more than one language, and not necessarily only in English and French, and there are some stations that broadcast in the local native languages, e.g., CFTL-FM Big Trout Lake, Ontario.

1. English-language Radio Coverage and Options for Canadian Stations

a. English-speaking Canada

As is shown in Table 22, the number of AM stations increased from 212 in 1967 to 272 in 1977. Of these new stations, 22 are in British Columbia, 11 in Alberta, and 11 in Newfoundland; the other 16 were fairly evenly spread among the other provinces.

The number of FM stations rose from 55 to 87. The largest increase was in Ontario, from 30 to 45; there are now six FM stations in Newfoundland, which had none in 1967. In the other provinces, the numbers range from one in Prince Edward Island (none in 1967) to 10 in British Columbia.

* In this analysis, data refer only to radio stations that originate programming and does not therefore include rebroadcasting stations.

TABLE 22

ALL CANADIAN RADIO STATIONS
TOTAL NUMBER OF ORIGINATING RADIO STATIONS IN EACH PROVINCE AND IN ALL CANADA
BY LANGUAGE OF BROADCAST AND BROKEN INTO AM AND FM
November 1967 - November 1977

		English-language		French-language		Multilingual		Other		Total	
		AM	FM	AM	FM	AM	FM	AM	FM	AM	FM
Nfld.	1967	14	0	0	0	0	0	0	0	14	0
	1977	25	6	1	0	0	0	0	0	26	6
PEI	1967	2	0	0	0	0	0	0	0	2	0
	1977	3	1	0	0	0	0	0	0	3	1
NS	1967	16	4	0	0	0	0	0	0	16	4
	1977	18	5	0	0	0	0	0	0	18	5
NB	1967	11	1	2	0	0	0	0	0	13	1
	1977	13	2	4	0	0	0	0	0	17	2
Ont.	1967	77	30	7	0	1	0	0	0	85	30
	1977	84	45	9	1	1	1	0	0	94	47
Man.	1967	13	5	1	0	0	0	0	0	14	5
	1977	16	6	1	0	1	0	0	0	18	6
Sask.	1967	18	3	2	0	0	0	0	0	20	3
	1977	19	4	2	1	0	0	0	0	21	5
Alta.	1967	19	5	1	0	0	0	0	0	20	5
	1977	30	8	1	0	0	0	0	0	31	8
BC	1967	42	7	0	0	0	0	0	0	42	7
	1977	64	10	0	1	1	0	0	0	65	11
English Canada	1967	212	55	13	0	1	0	0	0	226	55
	1977	272	87	18	3	3	1	0	0	293	91
Québec	1967	7	4	53	9	1	0	0	0	61	13
	1977	6	5	74	16	1	1	0	0	81	22
Canada	1967	219	59	66	9	2	0	0	0	287	68
	1977	278	92	92	19	4	2	0	0	374	113

In 1967, New Brunswick was the only province where less than the entire population (94 per cent) could receive at least one station. In 1977, a choice of four or more stations was available to everybody in all but three provinces; the exceptions were (1967 figures in brackets): Newfoundland 94.24 per cent (91.40); New Brunswick 73.44 per cent (55.26); and Ontario 98.70 per cent (95.23). It may therefore be said that most people in English-speaking Canada have a significant range of choice among English-language radio stations.

b. Québec

There are six English-language AM stations in Québec, there were seven in 1967; the number of FM stations has risen from four to five. However, while 80.58 per cent of the population had at least one station available in 1967, the corresponding figure for 1977 was 86.24 per cent. In 1967, just over half had access to five or more stations; in 1977, just under half had access to six or more. Thus the range of choice in Québec is quite wide, but there are undoubtedly pockets of English-speaking Canadians in Québec who have no choice or even no access to English-language radio stations at all.

2. French-language Radio Coverage and Options for Canadian Stations

a. Québec

There has been a substantial increase in the numbers of French-language AM and FM radio stations in Québec. The AM stations increased from 53 in 1967 to 74 in 1977, and the FM stations from nine to 16. In 1967, almost everyone (98.92 per cent) had access to at least two stations, while only 2.4 per cent had access to 11 or more; in 1977, almost two-thirds had access to 11 or more. This rate of expansion is remarkable.

b. English-speaking Canada

The number of French-language AM and FM radio stations in English-speaking Canada rose from 13 to 21 between 1967 and 1977. The 13 in 1967 were distributed thus: New Brunswick two; Ontario seven; Manitoba one; Saskatchewan two; and Alberta one. In 1977, the distribution of the 21 stations was: Newfoundland one; New Brunswick four; Ontario 10 (one FM); Manitoba one; Saskatchewan three (one FM); Alberta one; and British Columbia one FM. Very few French-speaking people in English-speaking Canada have any choice of stations, and those in Prince Edward Island have access to none; the coverage in Newfoundland, Manitoba, Alberta, and especially British Columbia is very limited.

3. Multilingual and Other Radio Coverage and Options

The number of stations of this type is small. Only two were in operation in 1967, both AM: CHIN Toronto, and CFMB Montréal. By 1977, four more stations had been licensed: CKJS Winnipeg; CJVB Vancouver; CHIN-FM Toronto; and a community-operated station doing some multilingual programming, CINQ-FM Montréal. They enlarge the range of choice available through radio coverage to people in those four cities.

4. CONCLUSIONS

1. There is a significant coverage of English-language radio by Canadian stations in Canada with the exception of the remotest parts of Newfoundland, New Brunswick, and northern Ontario. In English-speaking Canada 98 per cent of Canadians have access to at least four Canadian English-language radio stations. It is evident, however, that there are areas in Québec in which the English-speaking population is not adequately reached by English-language radio.

2. There is significant coverage and choice of Canadian French-language programming through radio coverage in Québec. Almost 97 per cent of the population in Québec has access to at least four French-language radio stations. However, although large areas of English-speaking Canada have access to one French-language station, there is little or no choice of stations except in Ontario and New Brunswick.

3. While it is evident that the great majority of Canadians have available to them radio broadcasting service in English and in French, there are both English and French population centres which have not yet received radio broadcasting services in the language of their choice. In addition, in certain areas served by Canadian AM stations, the nighttime coverage is adversely affected by US stations.

B. RADIO AUDIENCE PATTERNS IN CANADA*

In contrast to television programming, the proportion assigned to music on radio is predominant, and a great deal of the music may be categorized as popular of one sort or another; much of it international in character.

* The methodology of the statistical base for this analysis is described in Appendix II. Audience shares are analyzed on an all-day basis.

Another important aspect of radio programming is that radio stations tend to specialize in particular types of popular music, and their audience shares depend on their success in offering a mix of types that is likely to be most attractive. It is therefore not possible, as it is in television, to establish a clear-cut categorization of programming, and the only practical way of analyzing audience distribution is to examine the audience shares for different types of station. The categorization of different station types is complex, for at any time a station that is losing its audience share may decide to switch to a different format. The categories used for the different types of station are described in Appendix III.

It is feasible to analyze radio audience shares only in relation to the distinctions between English-language and French-language stations, with a subdistinction between AM and FM stations; the programming categories of stations; and the public sector (CBC-Radio-Canada) and the private commercial sector.

1. English-language and French-language AM and FM
Radio Stations

a. English-language AM and FM Radio Stations

The changes in audience patterns here are shown in Table 23. It will be seen that the audience share for Canadian English-language stations in English-speaking Canada has stood at over 97 per cent.

In Québec, the audience share for Canadian English-language stations has increased marginally from 24.12 to 25.06 per cent over the decade.

The trend from AM to FM in English-speaking Canada reflects the expansion of coverage by FM stations at about twice the rate for AM stations. In Québec, no new AM stations were added, and the number of FM stations increased from four to five; the trend to FM stations was less well marked than in English-speaking Canada, probably because English-speaking people in Québec do not all have access to English-language FM stations. Nonetheless, it seems likely that the increase in the overall audience share of English-language stations is attributable in part to the wider FM coverage.

TABLE 23

AUDIENCE SHARES FOR ENGLISH-LANGUAGE
AM AND FM RADIO STATIONS

	1967 %	1977 %
English-speaking Canada - AM	93.59	81.56
FM	4.10	15.71
AM and FM	97.69	97.27
Québec - AM	19.23	15.61
FM	4.89	9.45
AM and FM	24.12	25.06

b. French-language AM and FM Radio Stations

Table 24 shows the changes in audience shares of French-language radio stations that occurred between 1967 and 1977. In Québec, the swing to FM has been proportionately higher than that for English-language stations, a fact that reflects the greater increase of coverage by increased number of French-language FM stations, from four to nine. The audience share for French-language stations in English-speaking Canada declined from 1.77 per cent to 0.14 per cent, and the AM stations lost a little of their audience shares to the three FM stations introduced.

TABLE 24

AUDIENCE SHARES FOR FRENCH-LANGUAGE
AM AND FM RADIO STATIONS

	1967 %	1977 %
Québec - AM	70.37	60.65
FM	4.83	14.05
	75.20	74.70
English-speaking Canada - AM	1.76	1.23
FM	0.01	0.14
	1.77	1.37

2. Audience Shares by Station Type

a. Background of Analysis*

Audience shares for different types of station are weighted by the number of such stations available at any particular time, which may change from year to year, but it is safe to assume that, generally, those numbers and changes tend to reflect changes in popular preferences. It is important, too, to bear in mind that each category of station represents a particular mix of programming and does not mean that the station broadcasts only a single kind of programming, as explained in Appendix III. As an extreme example, there is no classical music station category, but it should not be inferred, of course, that no classical music is broadcast by Canadian radio stations. In assessing the mix in a station category, it is necessary to make some arbitrary decisions, and these may involve not only the nature of the composition but also the manner of the performance; the performance of a Beethoven composition by, say, the Hollywood Bowl Orchestra or André Kostelanetz may represent classical music to one kind of listener and popular to another.

In broad terms, broadcast music is divided into two groups:

- traditional music, including classical, opera, pure folk, and jazz; and
- popular music, which is subdivided into general popular, rock and rock-oriented, and country and country-oriented.

Here too, in the popular music category, there are performers who cannot be definitively assigned to any one of the three subdivisions.

In regulating and licensing AM stations, the CRTC sets certain basic standards on such matters as Canadian content and the inclusion of news and informational programs, and, to some extent, the proportionate nature of the mix of entertainment programming. A more positive adherence to the promise of performance is required of FM stations, on the principle that they can provide an alternative source of programming which must serve special-interest, minority audiences; the programming mix is therefore specified as an obligation in the terms of the licence, and a station may not change substantially the general shape of its programming mix without reference to the Commission.

* See Appendix II.

b. English-language AM and FM Radio Stations*

In 1967, by far the largest audience share for English-language radio stations was held by the middle-of-the-road category, with 43.65 per cent of the total audience. By 1977, this share had dropped to only 26.21 per cent, while the contemporary middle-of-the-road category had increased its share from 15.68 to 24.76 per cent; paradoxically, the contemporary stations suffered a loss from 14.16 to 11.33 per cent. The country category increased its share substantially from 2.37 to 8.13 per cent, and the easy listening stations improved from 6.01 to 7.95 per cent. Although insignificant in relation to the total audience, the share for information and talk stations rose from only 0.28 per cent in 1967 to 1.54 per cent in 1977. A change probably attributable to the increase in the number of FM stations was the larger share for progressive, album-oriented rock stations which rose from 0.36 to 3.05 per cent. The decrease in the number of block programming stations accounts for the decline of their audience share from 11.54 to 6.12 per cent.

c. French-language AM and FM Radio Stations**

A different pattern appears in the shares for French-language stations. The contemporary middle-of-the-road category increased its already large audience share from 34.98 to 53.62 per cent, but this was not at the expense of the middle-of-the-road stations, which also improved from 13.87 to 15.67 per cent. Meanwhile, the contemporary category increased its share very substantially from 1.13 to 8.77 per cent, and the easy-listening category (which gained among English-language stations) plummeted from 17.04 to 4.76 per cent. The reduction in the number of block programming stations is reflected in the decrease of the audience share from 9.90 per cent in 1967 to 1.86 per cent in 1977.

* See Appendixes II and III for methodology and category definitions. See also Volume II, pp.5-4 to 5-7, for a listing of the number of stations by type of format.

** The listening patterns for French-language stations may be distorted, for the purpose of comparison with those for English-language stations, by the fact that there are no French-language stations in the country and information and talk categories.

4. CONCLUSIONS

1. The audience share for Canadian English-language radio stations in English-speaking Canada has remained at about 97 per cent but within this overall percentage there has been a significant shift from AM to FM stations. Correspondingly the audience share for French-language stations in Québec has remained constant at about 75 per cent and there has been a proportionally higher shift from AM to FM stations.

2. The change of real significance is the audience share attraction from AM to FM stations. The swing to FM is likely to increase as more FM stations come into operation and as long as their pattern of service remains distinct and different from companion AM operations.

3. In parallel with the decline of audience share for French-language television, the audience for French-language radio in English-speaking Canada has slipped from 1.77 per cent to 1.37 per cent in the period reviewed.

4. Changes of audience shares from one type of AM station to another in the private sector are a reflection of change in popular music taste, and as such may have some relevance as indicators of what to anticipate in changing circumstances.

C. AUDIENCE SHARES FOR CBC-RADIO-CANADA AND PRIVATE, UNAFFILIATED RADIO STATIONS

The relatively large expansion of coverage by FM stations between 1967 and 1977 has naturally drawn off part of the audience share for AM stations (see Tables 23 and 24). The purpose of this section is to show how the CBC-Radio-Canada stations and networks have been doing in comparison with the private stations, and a clearer picture emerges when the AM and FM stations are grouped together for each. The several components of the public and private sectors are:

Public: CBC-Radio-Canada owned-and-operated stations (to some extent augmented by private stations affiliated to the public networks), and

Private: AM and FM stations unaffiliated to the CBC.

Tables 25 and 26 show the changes in the numbers of stations of each of the above types, and their audience shares in 1967 and 1977.

TABLE 25

AUDIENCE SHARES FOR CBC AND PRIVATE, UNAFFILIATED
ENGLISH-LANGUAGE RADIO STATIONS

	1967		1977	
	No. of Stns	Share %	No. of Stns	Share %
<u>English-speaking Canada</u>				
CBC AM	20	4.57	22	6.77
CBC FM	4	0.30	10	2.09
Total CBC	24	4.87	32	8.86
CBC AM affiliates	54	14.39	67	10.74
Total CBC and CBC network	78	19.26	99	19.60
Private, unaffiliated AM	138	76.40	183	65.58
Private, unaffiliated FM	51	3.87	77	13.92
US stations	-	0.47	-	.90
Total private, unaffiliated and US	189	80.74	260	80.40
<u>Québec*</u>				
CBC AM	1	3.93	1	7.55
CBC FM	1	0.71	2	1.46
Total CBC	2	4.64	3	9.01
CBC AM affiliates	1	3.96	1	3.16
Total CBC and CBC network	3	8.60	4	12.17
Private, unaffiliated AM	4	71.83	4	51.58
Private, unaffiliated FM	3	19.56	4	36.24
US stations	-	0.00	-	0.00
Total private, unaffiliated and US	7	91.39	8	87.82

* When interpreting the significance of audience shares in Québec it should be remembered that the total listening share of English-language stations was 25.06 per cent in 1977, as described in Table 23.

TABLE 26

AUDIENCE SHARES FOR RADIO-CANADA AND PRIVATE, UNAFFILIATED
FRENCH-LANGUAGE RADIO STATIONS

	1967		1977	
	No. of Stns	Share %	No. of Stns	Share %
<u>Québec</u>				
R.-C. AM	3	7.76	5	8.11
R.-C. FM	1	.31	3	1.30
Total R.-C.	4	8.07	8	9.41
R.-C. AM affiliates	22	18.24	31	14.98
Total R.-C. and R.-C. network	26	26.31	39	24.39
Private, unaffiliated AM	29	67.57	38	58.10
Private, unaffiliated FM	8	6.12	13	17.51
Total private, unaffiliated	37	73.69	51	75.61
<u>English-speaking Canada*</u>				
R.-C. AM	6	18.18	8	9.18
R.-C. FM	-	.02	3	1.25
Total R.-C.	6	18.20	11	10.43
R.-C. AM affiliate	6	40.07	8	40.23
Total R.-C and R.-C network	12	58.27	19	50.66
Private, unaffiliated AM	1	41.19	2	39.02
Private, unaffiliated FM	-	.55	-	10.32
Total private, unaffiliated	1	41.74	2	49.34

* When interpreting the significance of audience shares in English-speaking Canada it should be remembered that the total listening share of French-language stations was 1.37 per cent in 1977, as described in Table 24.

1. English-language Radio Stations

a. English-speaking Canada

It will be seen from the upper half of Table 25 that the much larger number of stations in 1977 has had virtually no effect on distribution of the audience for the public and private groups in total, the CBC and its networks having maintained its audience share of slightly less than 20 per cent. But within this total figure, the CBC owned-and-operated stations have almost doubled their audience share, from 4.87 to 8.86 per cent, partly because of changes in the CBC's programming, and partly because a number of affiliated stations has been replaced by repeater stations owned by the Corporation.

b. Québec

The lower half of Table 25 shows that the CBC owned-and-operated stations increased their audience share from 4.64 to 9.01 per cent. The total effect is that the audience share of the CBC stations in total increased from 8.60 per cent in 1967 to 12.07 per cent in 1977.

2. French-language Radio Stations

a. Québec

Table 26 shows the changes that have occurred in the audience shares for public and private radio stations in Québec between 1967 and 1977. The Radio-Canada owned-and-operated stations made slight gains, while the Radio-Canada affiliates lost some ground to the unaffiliated stations due to some extent to changes in the programming of Radio-Canada, and to some extent to the fact that some affiliates ceased being part of the network and were replaced by repeaters owned-and-operated by the Corporation. Among the latter, there was a significant swing from AM to FM stations as the number of the latter increased.

b. English-speaking Canada

The total audience for French-language radio stations in English-speaking Canada is very small, and fell from 1.77 to 1.37 per cent between 1967 and 1977 (see Table 24). Within this small share, Table 26 shows the relative shifts between the types of stations according to network affiliation. The Radio-Canada owned-and-operated AM stations lost about

half their audience share, a little of which went to its own FM stations and the rest to the unaffiliated FM stations. Meanwhile, the Radio-Canada affiliates maintained their position. It seems possible that these changes, which are of little real significance, may be attributable to the licensing of only one or two unaffiliated stations that were lucky enough to draw more of the audience share because of the program mix they offered.

3. CONCLUSIONS

1. It is evident that Canadians have access to an increasingly wide range of choice of Canadian radio stations. From 75 per cent to 95 per cent of the people in Québec, Ontario, Manitoba, Alberta, and British Columbia can choose among eight or more stations; access to seven or more stations is available to about 97 per cent of the people in Saskatchewan, 68 per cent in Newfoundland, 60 per cent in New Brunswick, and 36 per cent in Prince Edward Island and Nova Scotia.

2. It is apparent that the large increase in the number of radio stations licensed and operative has naturally broken into the audience shares of those formerly in existence. There has been an important shift from AM to FM stations and fragmentation has led to a substantial degree of specialization in radio format.

3. It is equally evident that the overall audience shares for CBC and Radio-Canada, both English- and French-language radio stations, have remained high and constant. There are however differing trends between the owned-and-operated stations and the affiliates. Considering the English-language stations, the owned-and-operated stations increased in audience share while the affiliates declined. With the French-language stations the affiliates also lost in audience share while the owned-and-operated stations gained slightly. The constant share of the audience for CBC-Radio-Canada is attributable to the quality of the radio programming of the public service; many CBC-Radio-Canada radio programs are indispensable for Canadian audiences.

D. MAJOR POLICIES

Two major initiatives over the past decade reflect the Commission's principal concerns with respect to radio: the introduction of the Canadian content regulations for AM, and the policy and regulations for FM.

1. Canadian Content

a. On AM

In 1968 most radio programming (particularly in the private sector) consisted of a mixture of commercially available records and talk. While most of the talk was Canadian, most of the music was not. (Given the difficulty of defining the many factors involved in this creative process, estimates of the level of Canadian content in 1968 - using the criteria of the present regulations - would range from a high of approximately 7 per cent to a low of below 4 per cent of the musical selections used on private radio.)

The Commission in 1970 held a public hearing on Canadian content and the regulations which resulted require that at least 30 per cent of the musical compositions broadcast between 6 am and midnight should qualify as Canadian and be scheduled in a reasonable manner throughout that period. A musical composition is deemed to be by a Canadian if it meets any two of the following four conditions: that the performers are Canadian, that the music, or the words are by a Canadian, or that the live performance was wholly recorded in Canada or wholly performed in Canada and broadcast live.

Inasmuch as the principal aim of the Commission was to ensure greater access by Canadian musical talent to its own airwaves, the regulation has definitely succeeded. With very few exceptions, sample checks have shown that broadcasters are complying with the regulation and that Canadian music is reasonably distributed across the day. A number of broadcasters voluntarily program more than the required 30 per cent, and the highest level obtained by the private sector is 45 per cent for an English-language and 57 per cent for a French-language station. For the CBC the highest levels were 61 per cent and 59 per cent respectively.

The average Canadian AM radio station devotes, between 6 am and midnight, no more than about half of its broadcast time to music. As, overwhelmingly, the non-musical elements in the programming are Canadian, and at least 30 per cent of the musical programming is Canadian, it can be concluded that the content of AM radio in Canada is predominantly Canadian. Perhaps an indirect measure of the success of the regulation has been the increase in revenues to Canadians as reported by one of the two Canadian performing rights societies, CAPAC. Payments to CAPAC writers, for instance, increased from \$364,000 in 1968 to \$2,256,000 in 1977 for a proportionate increase of 519 per cent.

b. On FM

The Commission adopted a different approach to FM with respect to Canadian content in order to allow FM broadcasters to continue to make available to their audiences music generally not available on AM radio, and because there was a scarcity of certain types of Canadian musical material.

The Commission did not introduce a regulation but rather specified, as a condition of licence, different levels of Canadian content for different types of stations on the basis of the availability of related Canadian musical material. If a station broadcasts country-and-western music, the Commission expects a Canadian content level of not less than 30 per cent, while for a station whose music is mainly instrumental a minimum of 10 per cent has been established.

Inasmuch as music programming occupies a larger share of the broadcast time of an FM station than of an AM station, and with the generally lower Canadian content levels of the music, it cannot be concluded at this time that the content of FM radio is predominantly Canadian.

2. The FM Policy

FM radio in Canada underwent a significant change in the early sixties. Until that time most FM stations had served as no more than higher fidelity transmitters of the same programming being broadcast by their AM sister stations (simulcasting). However, at the beginning of the decade the growing number of FM radio receivers in circulation prompted many FM licencees to begin to program their FM stations separately from the AM stations, using programming not generally available on the AM band. By the mid-sixties, however, the situation reversed. Many FM stations reverted to AM-type radio programming partly due to the rapidly increasing rate at which FM receivers were being purchased by the public.

One of the first actions of the CRTC was to call for a public hearing on the future of FM radio. This hearing took place in Montréal in June 1969 and after a considerable period of study, the Commission published its policy proposal in April 1973. Further discussions took place with numerous interested parties on the proposals and another public hearing was held in Ottawa in September 1973. The final FM policy was published in January 1975 together with a set of proposed FM regulations. A further public hearing on these regulations took place in Ottawa in March 1975, and the regulations were announced in July 1975 for implementation in September 1976.

The FM policy is "a policy to ensure a varied and comprehensive radio service." One of its principal aims is to have FM serve those audiences, particularly minority audiences, whose needs are not being met by AM. The Commission was of the view that continued joint ownership of two radio licences in the same community, which was and is the rule rather than the exception, could not be defended unless substantial efforts were made to offer an FM service distinctively different from the usual AM programming to complement the other radio services available in the community.

While the Commission adopted as part of the FM policy several regulatory measures of a general nature, those measures specifically relating to the role of FM are few. Only three significant regulations were introduced or changed:

- a regulation prohibiting simulcasting between 6 am and midnight;
- a regulation limiting the amount of commercial time; and
- a regulation requiring that a certain minimum percentage of time to be devoted to programs, whether musical or other, of a single theme without irrelevant interruption.

Among other policy objectives set out for FM were first, the development of a more in-depth treatment of news to complement the often superficial news treatment on AM and second, the extension of the range of music selection, and in fact of FM programming in general, beyond the predictable and repetitive to include the innovative, the unusual, and the undiscovered.

Perhaps, in part, because of the changes introduced by the Commission, FM radio continues to grow in appeal and an extensive evaluation of FM conducted by the Commission in the early part of 1978 confirmed that the number of persons actually listening to FM was continuing to increase, with a commensurate increase of revenues from the sale of air time for commercial FM stations.

3. CONCLUSION

Canadian content rules and regulations have definitely succeeded in contributing to the predominance of Canadian creative and other resources for Canadian AM radio. The same considerations are not yet relevant to FM radio which is in a period of transition and development.

IV. OWNERSHIP

The first Canadian radio broadcasting licence was issued in 1919, but it was not until three years later that regulations for licensing private commercial broadcasting stations were made under the Radio Telegraph Act. A matter of great concern was that several of the stations that had started up in the meantime had become affiliated to US networks. By 1930, some 80 broadcasting licences had been issued, and many of them were for stations controlled by foreign interests, some of them not American but British. The general concern on this issue was expressed by the Prime Minister, R.B. Bennett, in 1932 when introducing the Bill to establish the Canadian Radio Broadcasting Commission; he said:

...this country must be assured of complete Canadian control of broadcasting from Canadian sources, free from foreign interference or influence. Without such control radio broadcasting can never be a great agency for the communication of matters of national concern and for the diffusion of national thought and ideals, and without such control it can never be the agency by which material consciousness may be featured and sustained and national unity still further strengthened.

Attempts to decrease the level of foreign ownership of broadcasting undertakings were made during the 1930s and 1940s but failed to achieve the desired objective. Accordingly, Section 14 of the 1958 Broadcasting Act, which established the Board of Broadcast Governors,* provided that:

- (1) The Board shall not recommend the issue of a licence or grant permission to operate a network of broadcasting stations unless the applicant therefore is
 - (a) a Canadian citizen, or
 - (b) a corporation incorporated under the laws of Canada or any province, the chairman or other presiding officer and at least two-thirds of the directors of which are Canadian citizens and at least three-fourths of the shares of which (having full voting rights in all circumstances) belong to
 - (i) Canadian citizens, or

* Broadcasting licenses were still to be issued by the Minister of Transport under the Radio Act.

- (ii) a corporation other than a corporation controlled directly or indirectly by citizens or subjects of a country other than Canada.

- (2) The Governor in Council may exempt from the operation of this section, upon such terms and conditions as the Governor in Council may prescribe, any person who, at the time of the coming into force of this Act, was the holder of a licence and was not a person described in paragraph (a) or (b) or subsection (1).

The reason for the loophole in subsection (2) was that, for economic or political reasons, the Government did not want to force divestiture on two or three large foreign firms, including the British Marconi Company, that then held broadcasting licences. The result was that these foreign firms still held their licences when the new Broadcasting Act came into force in 1968.

In other respects, the provision in the 1958 Act had not proved entirely satisfactory. For instance, a corporation that was not disqualified by the wording of paragraph (b)(ii) might in its turn be wholly under foreign ownership and control. Nevertheless, a substantial elimination of foreign ownership had been achieved by 1968, at least as regards radio and television licences; cable television undertakings, however, did not then require a broadcasting licence but only a radio licence, and were not covered by Section 14 of the Broadcasting Act of 1958.

In preparing the Bill for the 1968 Act, it was decided that there should be no provision governing foreign ownership but that, as the authority to issue broadcasting licences was to be transferred to the CRTC, the Governor in Council should be empowered (Section 22) to give directions to the CRTC respecting

the classes of applicants to whom broadcasting licences may not be issued or to whom amendments or renewals thereof may not be granted and any such class may, notwithstanding Section 3,* be limited so as not to preclude the amendment or renewal of a broadcasting licence that is outstanding on the 1st day of April 1968.

* Section 3, the broadcasting policy for Canada, declared in S. 3(b) that "the Canadian broadcasting system should be effectively owned and controlled by Canadians."

There were two reasons for the provision that existing licences might be amended or renewed. First, it would give the affected companies a reasonable time to put their affairs in order; second, it allowed time in which to devise a form of direction that effectively closed all the loopholes that the former statutory provision had left open. As was expected, this was not a simple matter, and two or three Orders in Council were issued, actually on a trial basis, during 1968 and 1969 before a satisfactory wording was found for the Order in Council that is still in force.*

Complications arose, however, with regard to the cable television companies, to which broadcasting licences now had to be issued within a reasonable period prescribed in a transitional provision of the Act. What had been overlooked was that the permission to amend or renew existing broadcasting licences to allow time for divestiture did not apply to the cable television companies, because they did not have broadcasting licences that could be amended or renewed. Nevertheless, in granting licences to them, the CRTC had to comply with the original Order in Council respecting foreign ownership. A fair amount of confusion ensued, for many of the cable television companies did not conform, and divestiture had to be enforced at an unreasonable pace. This process had the beneficial side-effect of disclosing weaknesses in the early versions of the Order in Council, which were successively amended until satisfactory wording was found.

The Order in Council now in force not only dealt with the problem of steps in the upward ladder of ownership and control but also reduced the permissible level of ownership from the 25 per cent allowed in the 1958 Act to 20 per cent. As a result, divesting action had to be initiated by a total of 80 undertakings: 13 television companies, 11 radio companies, and 56 cable television companies (many of which were foreign-owned to the extent of 50 per cent or more). The total value of the shares to be divested by companies of all three kinds amounted to nearly \$150 million.

At the time, there were still some radio and television companies that were at least 50 per cent foreign-owned. Their total operating revenues amounted to some \$11.5 million, and their total fixed assets to over \$9.5 million, representing in both cases 6.2 per cent of the total for the industry. Radio and television companies at least 20 per cent foreign-owned had total operating revenues of almost \$24 million and total fixed assets of over \$25 million, representing 13.0 per cent and 16.3 per cent respectively of the totals for the industry. There were also some companies which, although less than 20 per cent foreign-owned, had foreign directors on their boards.

* P.C.1969-2229, 20 November 1969.

The cable television companies that were at least 50 per cent foreign-owned had total operating revenues of over \$9 million (16.5 per cent) and total fixed assets of nearly \$13 million (9.9 per cent). Those that were at least 20 per cent foreign-owned had total operating revenues of \$30.7 million (55.8 per cent of the total for the industry) and total fixed assets of almost \$61 million (46.5 per cent). Thus it was on the divestitures in the cable television industry that the heaviest burden for the CRTC fell.

The process went on apace, and was largely completed by the end of 1971, with divestiture by nine television companies, eight radio companies, and 54 cable television companies. Divestiture for all the remaining companies was completed in 1972, except for one cable television company which has subsequently been divested. The value of the shares divested amounted to \$33.5 million in 1970, \$96.5 million in 1971, and \$19.4 million in 1972, figures that indicate a remarkably successful achievement. Present levels of foreign ownership in the broadcasting industry are shown in Table 27.

TABLE 27

LEVELS OF FOREIGN OWNERSHIP IN THE
CANADIAN BROADCASTING INDUSTRY, 1977

Level of Foreign Ownership of Companies Holding Broadcasting Licences for:	Total Operating Revenue		Total Fixed Assets	
	\$	% of Total	\$	% of Total
	Million	for Industry	Million	for Industry
Radio and TV undertakings:				
0 to 10 per cent	62.5	10.40	37.00	10.40
10 to 20 per cent	-	-	-	-
Radio undertakings:				
0 to 10 per cent	14.10	5.20	4.60	3.40
10 to 20 per cent	0.06	-	0.14	0.10
Television undertakings:				
0 to 10 per cent	48.39	14.50	32.41	14.70
10 to 20 per cent	-	-	-	-
Cable television undertakings:				
0 to 10 per cent	43.61	19.10	97.87	20.1
10 to 20 per cent	48.52	21.20	98.64	20.30

Source: CRTC Annual Returns for year ended 31 August 1977.

The figures in Table 27 show that, although there are still substantial foreign holdings of up to 10 per cent among radio and television undertakings, and of up to 20 per cent among cable television undertakings, the policy objective enunciated in the Broadcasting Act that "the Canadian broadcasting system should be effectively owned and controlled by Canadians" has been achieved through the firm standards prescribed by the Government and their implementation by the CRTC.

CONCLUSIONS

1. Prior to the 1969 Order in Council on foreign ownership, radio and television companies at least 20 per cent foreign-owned had total operating revenues of almost \$24 million, representing 13.0 per cent of the total for the industry. The comparable figure for cable television is \$30.7 million, representing 55.8 per cent of the total for the industry.

2. As a result of the Order in Council, there are now no broadcasting or cable television undertakings where foreign ownership exceeds 20 per cent, or where there are foreign directors. The policy objective enunciated in the Broadcasting Act has been achieved.

V. THE ECONOMIC STATUS OF THE CANADIAN BROADCASTING INDUSTRY

A. BROADCASTING AS A GROWTH INDUSTRY

From 1967 to 1977, the GNP rose by 213 per cent. During the same period, the total requirements of the CBC rose by 210 per cent. Table 28 shows that the rate of growth was much higher in the private sector, except for radio stations, and that the increase in CBC revenues from non-governmental sources was proportionately much lower.

TABLE 28
GROWTH OF BROADCASTING INDUSTRY, 1967-1977

Percentage Increase

	Total Revenues	Operating Profits
CBC: television and radio*	114	-
Private sector: television	249	413
radio	205	295
cable television	934	1,133

Sources: CRTC Annual Returns and Statistics Canada.

* Note that for the CBC, "Total revenues" includes only revenues earned and excludes funds from Parliament. "Operating profits" excludes interest and depreciation.

Figure G shows the increases in total revenues for the CBC (television and radio) and the private sector; private television and radio have been totalled to provide a comparison with the CBC, and cable television is shown separately. Here, total revenues for the CBC includes the net cost of operation covered by funds from Parliament.

It is also illuminating to compare the costs of supporting the broadcasting system on a per household basis. Table 29 presents this information for both 1967 and 1977. In 1977 the calculation reveals that the cost of the system for a cable household was \$218.16, that is, the cost of cable service, plus the cost of the CBC, plus the cost of private broadcast services. Without cable, the broadcasting cost per

FIGURE G BROADCASTING AND CABLE: TOTAL REVENUES

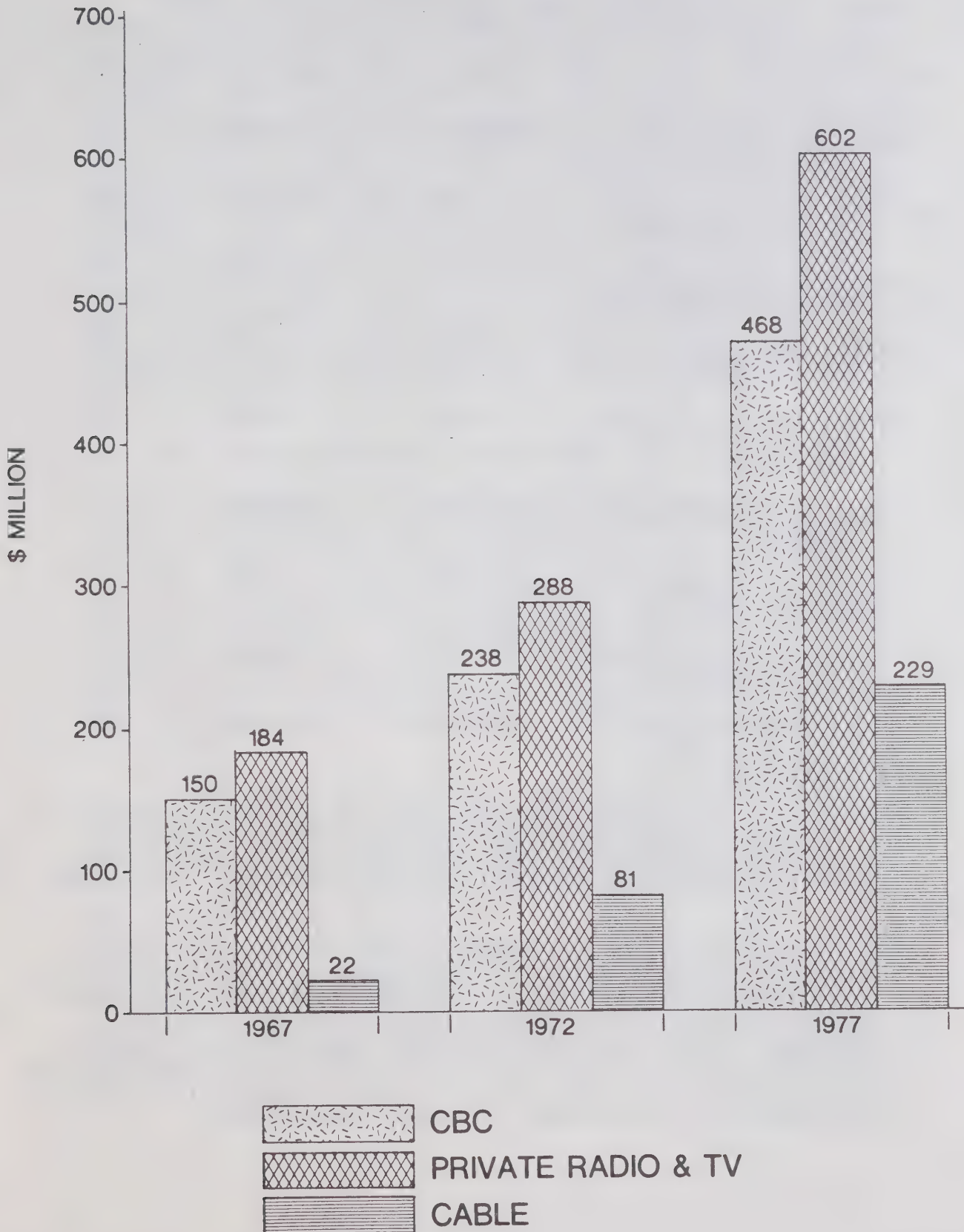


TABLE 29

OPERATING COSTS AND REVENUES EARNED
Per Household Cost of Broadcasting and Cable,
1967 and 1977*

	1967	1977	% growth
Total broadcasting costs (x1000)*	334,036	1,067,699	220
Total Canadian households (x1000)	5,373	7,057	31.3
Total broadcasting cost per household	62.17	151.30	143
Total CBC cost per household	27.94	65.93	136
Total private broadcasting cost per household	34.23	85.37	149
Total cable revenues (x1000)	22,115	228,585	934
Total cable households (x1000)	517	3,419	561
Total cable cost per cable household	42.78	66.86	56
Total broadcasting cost per cable household	104.95	218.16	108

* "Total Broadcasting Costs" are the sums of advertising revenues for private radio and television, and the net cost of operation plus advertising revenues, for the CBC.

household is \$151.30, of which \$65.93 can be allocated to supporting the CBC and \$85.37 for private Canadian radio and television services. It must be emphasized that per household costs obtained by simply dividing total industry revenues by the number of Canadian households are somewhat fictional because actual costs and benefits are more unevenly distributed. Also, the extent to which advertising revenues are passed on to consumers is often contentious.

B. THE CBC-RADIO-CANADA

CBC-Radio-Canada is supported by public funds supplemented by revenues earned, mostly from advertising. While the rate of growth of the Corporation's total requirements was about the same as that of the GNP, total revenues earned increased at only just over half that rate. This is partly attributable to the policy decision to abandon advertising on radio, except for certain proprietary programs (such as the Texaco Metropolitan Opera live broadcasts); radio revenues therefore declined from about \$2.3 million in 1967 to only \$348,000 in 1977. Television revenues increased from \$29.73 to \$67.70 million during the period, or by about 128 per cent, compared with 249 per cent for private television stations. In 1967, the revenues earned amounted to about 21 per cent of total requirements; the proportion fell to 17 per cent in 1972, and again to only 15 per cent in 1977. More complete figures on the revenues and expenses of the CBC are given in Tables 30 and 31.

C. THE PRIVATE SECTOR: TELEVISION

The figures in Table 28 show that the private television industry, as a whole, has achieved remarkable progress since 1967, and appears to be in a very healthy position indeed. Total revenues increased from \$95.2 to \$331.7 million in 1977, or by 249 per cent, and operating profits from \$15.9 to \$81.4 million, or by 413 per cent (Tables 32 and 33). These overall figures, however, obscure the fact that there are television stations in smaller communities that may be only just getting by, with the corollary that those in the largest cities are very lucrative.

Reliable statistics for the details of operating expenditures are not available for 1967-1971; between 1972 and 1977 programming costs rose at the same rate as revenues, 134 per cent compared to 132 per cent. During those five years, operating profits increased by 143 per cent, compared to an increase of 97 per cent in GNP. For the sector as a whole, production costs rose from \$37.4 million in 1972 to \$82.5 million in 1977, or by 121 per cent, while the cost of program purchases rose from \$18.2 to \$49.1 million, or by 169 per cent. It is true that the foreign programs purchased undoubtedly attract a larger share of the total audience, providing economic justification for this difference.

TABLE 30

CBC, RADIO AND TELEVISION : SELECTED ECONOMIC STATISTICS (\$1000's)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
Net cost of operation	118,045	145,685	164,792	163,111	184,635	199,012	221,217	253,331	268,100	333,952	396,779
Gross fixed assets	123,023	139,689	171,841	200,437	225,918	246,083	272,416	302,927	355,896	416,240	472,195
Net fixed assets	74,990	87,918	101,855	121,751	138,448	148,490	161,691	174,006	212,243	252,473	284,515
Capital grant	-	-	-	-	-	-	-	21,000	43,657	64,146	69,963
Olympics grant	-	-	-	-	-	-	-	-	-	8,800	3,000
Television revenue											
local	789	866	2,001	2,467	2,807	3,378	4,216	5,123	6,177	8,625	8,054
national*	8,347	9,190	11,236	12,551	11,849	13,559	15,899	16,965	19,131	21,187	24,489
network	19,884	21,613	21,893	25,362	23,645	17,979	22,612	23,650	25,527	28,567	32,721
other	709	1,267	736	993	1,058	1,366	1,292	1,304	1,603	2,000	2,433
Total	29,729	32,936	35,866	41,373	39,359	36,282	44,019	47,042	52,438	60,379	67,697
Radio revenue											
local	383	441	679	810	906	992	1,219	1,373	919	212	172
national	820	743	628	663	760	894	1,130	1,357	750	47	68
network	786	728	656	491	436	520	405	292	344	82	99
other	334	53	15	21	12	11	10	1	1	2	9
Total	2,323	1,965	1,978	1,985	2,114	2,417	2,764	3,023	2,014	343	348
Olympic revenue	0	0	0	0	0	0	0	0	9,860	17,466	465
Total (radio and TV) revenue	32,052	34,901	37,844	43,458	41,473	38,699	46,783	50,065	64,312	78,188	68,510
Total (radio and TV) program expenses	98,002	119,440*	117,066	118,308	126,171	133,687	169,877	182,205	193,369	230,364	262,824
Total program expenses											
TV	78,010	97,344	92,482	93,345	100,054	105,479	134,033	142,120	150,828	178,302	206,317
radio	19,992	22,096	24,584	24,963	26,117	28,208	35,844	40,085	42,541	52,062	56,507

Source: CRIC Annual Returns. Note that since the breakdown of program expenses into radio and television is not supplied on the Annual Returns, the proportional split supplied in the CBC Annual Reports was used.

* Revenues from national sales refer to purchases of time on individual stations by "national" advertisers.

** Year ending March 31.

TABLE 31

PUBLIC BROADCASTING GROWTH - CBC-RADIO-CANADA

	1967-77 %	1972-77 %
Net cost of operation	236	106
Gross fixed assets	284	92
Net fixed assets	270	92
Total operating revenues	114	77
Total cost of operation	210	101
Total program expenses - TV	165	96
- radio	183	100
TV revenues		
local	921	138
national	193	81
network	65	82
other	243	78
total	128	87
Radio revenues		
local	-55	-83
national	-92	-92
network	-87	-81
other	-97	-18
total	-85	-86

TABLE 32

PRIVATE TELEVISION STATIONS : SELECTED ECONOMIC STATISTICS, 1967-1977 (\$1000's)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
Total revenue	95,178	99,178	106,575	111,165	115,789	143,309	171,247	194,233	226,283	281,149	331,697
Operating profit	15,856	17,484	21,928	17,626	13,420	33,459	41,849	32,966	49,617	73,288	81,369
Pretax profit						25,225	29,771	22,771	37,943	57,802	68,905
Total program expenses			24,248	24,965	27,862	58,956	69,389	88,195	93,477	110,255	137,848
- program production			7,625	8,142	9,338	37,371	46,421	51,805	58,435	69,543	82,449
- program purchase expenses			16,823	16,823	18,524	18,237	19,594	32,514	30,726	35,118	49,108
Gross fixed assets			100,144	100,144	111,941	123,036	128,498	157,493	178,785	200,957	220,280
Net fixed assets			42,776	42,776	47,739	50,089	51,424	71,797	84,538	94,745	110,649

Source: Statistics Canada and CRTC Annual Returns. Note that the definition of costs used on the Annual Returns changed between 1971 and 1972. Thus caution in the interpretation of changes in costs and profits over this period is advised.

TABLE 33

ECONOMIC GROWTH OF PRIVATE TELEVISION STATIONS,
DAILY NEWSPAPERS, AND GNP, 1967-1977

	1967-1977 %	1972-1977 %
Total revenue	249	132
Operating profit	413	143
Pretax profit		173
Total program expenses		134
Total program production expenses		121
Total news expenses		239
Total program purchases expenses		169
Gross fixed assets		127
Net fixed assets		121
Daily newspaper revenues	175	76
GNP	213	97

D. THE PRIVATE SECTOR: RADIO

From 1967 to 1977, the total revenues of the private radio stations increased from \$88.8 to \$270.7 million, or by 205 per cent compared to 213 per cent for GNP (Tables 34 and 35). Actually, the rate of growth slowed down in the second half of the period, when revenues increased by only 88 per cent, as compared with 132 per cent for television.

Total programming expenditures rose from \$38.43 million in 1972 to \$79.98 million in 1977, or by 108 per cent. The breakdown between production and purchase is quite different from that for television. In 1977, production expenses were \$75.81 million compared to only \$4.01 million for purchases. The rates of increase since 1972, however, showed a noteworthy difference: 106 per cent for production, and 227 per cent for purchases.

TABLE 34

PRIVATE RADIO : SELECTED ECONOMIC STATISTICS (\$1000's)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
Total revenue	88,761	95,679	108,088	114,548	125,693	144,276	159,842	182,857	207,862	243,852	270,713
Operating profit	11,617	12,418	14,695	13,216	16,648	30,831	31,630	37,221	39,904	46,053	45,836
Pretax profit						28,412	24,955	29,500	31,238	36,309	36,239
Total program expenses			7,745	7,555	7,849	38,431	44,403	50,021	58,583	68,939	79,983
FM revenues independent combined Total						1,795 3,344 5,139	2,230 5,575 7,805	3,504 8,260 11,764	4,333 10,568 14,901	5,544 13,045 18,589	9,073 16,079 25,152
Gross fixed assets			79,998	109,150	108,318	87,365	89,565	98,320	105,334	117,339	136,262
Net fixed assets			37,580	48,506	46,138	38,974	37,537	43,464	46,402	52,117	64,827

Source: Statistics Canada and CRTC Annual Returns. Note that the definition of costs used in the Annual Returns changed between 1971 and 1972. Thus caution in the interpretation of changes in costs and profits over this period is advised.

TABLE 35
ECONOMIC GROWTH OF PRIVATE RADIO STATIONS
1967 - 1977

	1967-1977 %	1972-1977 %
Total revenue	205	88
Operating profit	295	49
Pretax profit		28
FM revenues		
Independent		405
AM-FM combined		381
Total		389
Gross fixed assets		56
Net fixed assets		66
Program expenses:		
Total program expenses		109
Total production expenses		106
News production expenses		139
Total purchase expenses		227

While the general growth of radio stations was healthy over the whole period, a very different picture emerges from the figures for operational profits in the first and second halves respectively. From 1967 to 1972, operating profits rose from \$11.62 to \$30.83 million, or by 165 per cent, but from 1972 to 1977 the increase was only from \$30.83 to \$45.84 million, or 49 per cent. These figures contrast sharply with those for television, where operating profits increased by 111 per cent in the first five years and 143 per cent in the second.

The notable increase in the number of FM stations and their share of radio listening has been demonstrated. As a consequence, the economic growth of FM radio has been dramatic and revenues have increased from \$5.14 million in 1972 to \$25.15 million in 1977, representing a growth of 389 per cent (figures for FM revenues are not available prior to 1972). FM revenues though represented only 9 per cent of total private radio revenues in 1977.

E. THE CABLE TELEVISION INDUSTRY

Cable television is one of the most rapidly growing industries in Canada. Total revenues increased from \$22.1 million in 1967 to \$81.4 million in 1972, or by 268 per cent; then again to \$228.6 million in 1977, or by another 181 per cent (Tables 36 and 37). The increase from 1967 to 1977 was no less than 934 per cent, but the breakdown between the first and second five years suggests that this enormous growth is slowing down. This trend is reflected in the figures for operating profits, which increased from \$8.42 million in 1967 to \$39.46 million in 1972, or by 369 per cent, and again to \$103.80 million, or by 163 per cent in 1977.

An interesting feature of the data is the rapid growth in the past five years of expenditures on programming by cable television operators. A modest start was made in 1970 (when data are first available), and by 1972 the total amounted to \$2.5 million. By 1977, the total had risen to a rather surprising \$12.8 million, representing an increase of 414 per cent in the five-year period. Cable operators are required, in compliance with CRTC regulations, to provide a "community channel." Because the community channel concept is not based on the conventional television approach of audience maximization, audience shares are very small and consequently do not show up in the general television audience data.

F. CONCLUSIONS

1. The total revenues of broadcasting (including the CBC-Radio-Canada) and cable television kept pace with the growth of GNP over the decade. The latter increased by 213 per cent from 1967 to 1977.
2. Cable television, as an industry, showed exceptional growth. Total revenues increased from \$22.1 million in 1967 to \$228.6 million in 1977, for a growth of 934 per cent.
3. The revenues of private radio and television increased at a healthy rate from 1967 to 1977. Television revenues increased from \$95.2 million to \$331.7 million, or at a rate of 249 per cent, while radio revenues increased from \$88.8 million to \$270.7 million, for an increase of 205 per cent.

TABLE 36

CABLE TELEVISION : SELECTED ECONOMIC STATISTICS (\$1000's)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
Total revenue	22,115	31,286	37,380	54,940	66,620	81,420	106,609	132,254	159,480	192,372	228,585
Operating profit	8,416	12,725	28,349	24,659	32,424	39,463	52,480	66,330	74,226	85,616	103,798
Pretax profit	1,652	4,851	19,318	13,597	12,080	14,803	20,586	26,526	28,665	30,947	41,489
Program expenses	-	-	-	264	504	2,493	3,393	4,603	6,149	9,541	12,811
Gross fixed assets	-	72,901	100,669	131,118	159,770	193,583	244,229	298,898	353,450	418,238	486,546
Net fixed assets	-	48,922	71,659	87,899	103,507	118,767	146,356	179,787	203,394	233,373	264,845

Source: Statistics Canada and CRTC Annual Returns.

TABLE 37
ECONOMIC GROWTH OF CABLE TELEVISION SYSTEMS
1967 - 1977

	1967-77 %	1972-77 %
Total revenue	934	181
Operating profit	1133	163
Pretax profit	2411	180
Program expenses		414
Gross fixed assets		151
Net fixed assets		123

4. Although revenues for FM radio are still small, they are growing at a rate which exceeds other radio and television revenues. FM revenues were only \$5.14 million in 1967 but increased to \$25.15 million in 1977, for a growth of 389 per cent.

5. The total resources available to the CBC are comprised of public funds and revenues earned (mostly from advertising). In these terms, the total requirements of the CBC increased from \$150.10 million in 1967 to \$465.23 million in 1977, representing a growth of 210 per cent, which is not out of line with the expansion of resources for private radio and television.

6. The proportion, however, which the CBC generated itself declined from 21 per cent in 1967 to 17 per cent in 1972 and 15 per cent in 1977. In this context, the CBC entered the decade predominantly as a publicly financed broadcasting institution and ended it even more so, largely a result of an intentional decrease in the sale of advertising time. Commercial revenues from radio actually declined by 85 per cent over the 10 years to the point where radio only generated \$348,000 in 1977.

VI. GENERAL OBSERVATIONS AND CONCLUSIONS

It is important to emphasize that this report is a statistical survey of the broadcasting decade 1968-1978. The main chapter conclusions are based on statistical data derived from BBM and similar information sources.

The quantitative emphasis of the report dominates and no attempt has been made to evaluate qualitative trends and improvements in programming in the 10-year period. There is a disadvantage to this approach. The impression might be left that the broadcasting industry is comparable and analogous to a more conventional transportation or service industry, to be evaluated exclusively on the basis of such quantifiable indices as the number of stations licensed, the number of channels available, and the number of subscribers served.

The Canadian broadcasting system is a national cultural resource dedicated by statute for the benefit of all Canadians, in all regions of Canada, to safeguard their identity and unity, to enrich their cultural understanding, and to strengthen the fabric of their country. If the system does not provide those programming benefits then it is nothing. If the programming of the system does not display the images, sounds, and accomplishments of Canadians, then Parliament's clear objectives and expectations have been negated.

On reviewing the initial statistical analysis the Commission concluded that Canadians would benefit from a factual report on the state of their broadcasting system. The information speaks for itself and the facts should lead Canadians to a more searching reassessment of the improvements and financial requirements necessary to maintain the Canadian broadcasting system as a cultural possession.

A. OWNERSHIP

A review of the implementation of the Order in Council on foreign ownership indicates that there are now no broadcasting or cable television undertakings in which foreign ownership exceeds 20 per cent and there are no foreign directors.

It is an unprecedented development that a major Canadian industry, which in 1969 had significant foreign ownership, should now be totally and effectively owned and controlled by Canadians in conformity with the objectives of the Canadian Broadcasting Act.

B. EXTENSION OF SERVICE

The extension of broadcasting services to Canadians is a remarkable achievement. Considerable energy, skill, and resources have been used to bring basic Canadian radio, television, and cable television services to all regions. The extension over the decade of radio and television services has been dramatic and consistent with the objective of the Broadcasting Act, that all Canadians have an entitlement to broadcasting services in the official language of their choice.

There are Canadians, however, who on reading the aggregate statistical results will question their validity. There can be a significant difference between a statistical coverage survey and the actual quality of signals received. In some areas in Canada there are significant inadequacies in the coverage presently provided; there are, in addition, distinct anomalies in the quality of service provided in neighboring communities; and there still are important unserved areas. The financial resources are not yet available to resolve all these problems, but there can be no doubt that it is the clear intent of those in the broadcasting industry to remedy these deficiencies.

It is important to underline that technological developments could be harnessed to resolve all coverage problems. In particular, satellite technology presently available could be employed to assist in the national objective to serve all Canadians with basic Canadian broadcasting services.

C. CABLE TELEVISION

The analysis further reveals that, over the decade, a major change has taken place in cable technology and in cable services provided. In 1967 cable television represented only 6.2 per cent of the gross revenues of the broadcasting system. In 1977 this share had risen to 17.6 per cent.

In 1968 cable television was a relatively new industry; only 29.9 per cent of Canadian homes were passed by cable. By 1977, 71.7 per cent of homes had access to cable and of those, 68 per cent subscribed representing a total of 3.4 million or 48.8 per cent of Canadian households. By 1977 total cable revenues had increased in the decade from \$22 million to \$228.5 million.

The impact of cable television on the audiences of Canadian television stations has been a matter of great concern and extensive debate. Now that the extension of traditional cable television is approaching its natural limits, it is an important time for an assessment.

In 1967, 49 per cent of Canadians, principally those living in the border areas, had access to at least one US over-the-air television signal. It is in those same border areas where, throughout the decade, significant increases in cable penetration have taken place, while in the latter half of the decade cable has been extended to areas where over-the-air US signals are not receivable. In national terms the gain in audience share for American stations has increased only from 24.28 per cent to 29.19 per cent in English-speaking Canada, and from 3.79 per cent to 8.84 per cent in French-speaking Canada. It is possible that the aggregate audience loss for Canadian stations is not as great as generally believed, and if the assessment of the impact of cable were limited to those results, then the concerns frequently expressed might be significantly reduced. However, the aggregate assessment obscures important factors.

First, in spite of the fact that over the decade significant new Canadian stations, including CITY Toronto, Global Television, CKVU Vancouver, CITV Edmonton, and CKND Winnipeg were licensed and became operative and CTV service was extended to Saskatchewan, New Brunswick, Nova Scotia, and northeastern Ontario, the audience share of US signals has decidedly increased. It should also be noted that the audience share of US signals actually slipped slightly, in Ontario from 35.9 per cent to 35.8 per cent and in BC from 40.9 per cent to 40.0 per cent. The impact of the US signal has therefore been felt most heavily in less populated areas and in those provinces which do not receive US signals over-the-air. In Alberta, for example, the US audience share went from 1.4 per cent to 19.7 per cent, and in Nova Scotia from 0 per cent to 15.7 per cent.*

Second, there has been an increase in the viewing of US signals in spite of the introduction of Commission regulations with respect to simultaneous program substitution and the priority carriage of Canadian signals, and the Commission's policy position with respect to the carriage of duplicate US signals and microwaved US signals.**

* See Table 4, "Viewing Audience Share: 1967 and 1977," p.28.

** For a more complete explanation of the Commission's policy position, see p.98, below.

Third, the effect of extending US signals by microwave to areas previously unserved is devastating. There is fully substantiated evidence that the importation of three US signals via microwave reduces the audience share of Canadian stations by over 50 per cent (for further details see Chapter II. D, "Television audience fragmentation and cable impact," p.27).

The effect of the importation of US signals on viewing patterns in previously unserved areas, and consequently on the economic position of Canadian broadcasters serving those areas, is significant, especially since advertising revenues are so sensitive to the audience reached.

At the same time it has been difficult to deny the legitimacy of the claim of Canadians in non-border areas to be treated as equitably as other Canadians with respect to the provision of broadcasting services. Yet the ultimate effect of cable penetration on the audience shares and the economics of local Canadian broadcasting stations must be appreciated.

The Commission has recently established limits on the extension of US signals by stipulating that no additional duplicates of US signals will be allowed: for example, if a cable system already distributes the ABC station, Buffalo, it will not be allowed to distribute the ABC station, Rochester.* In addition, the Commission has indicated that US signal carriage via microwave should be limited to three commercial US stations and one non-commercial US station. In cable franchise areas where the majority of the population can receive, over-the-air, the US signal then the Commission has approved that US signal carriage on cable systems.**

* At the Commission's recent public hearing in Toronto, CBC representatives indicated that an analysis of the 15 signals carried by Rogers Cable, Toronto (10 Canadian, five US) in the week of 7 to 13 January 1978 revealed that there were 2,000 hours of programming of which 36.2 per cent was Canadian. If the three duplicates applied for had been approved, there would have been 2,400 hours of programming of which only 30.7 per cent would have been Canadian.

** The comparison of Ottawa and Toronto, for example, is instructive. Ottawa receives via microwave three US commercial signals and PBS; Toronto, since it can receive at least five US signals off-air, has approval for carriage on cable of those five signals.

It is suggested that these limitations may be inequitable because they deny corresponding broadcasting services to Canadians in every area of the country. If, however, the local Canadian television station finds it financially difficult to continue or in order to compete cuts back on its local Canadian regional news and information services, then the loss is suffered by all those who are served, as of right, by the over-the-air Canadian broadcasting station.

It is to be recalled that while upwards of 71 per cent of Canadian households are now passed by cable, 68 per cent of those who are capable of receiving cable television subscribe. In other words, about 48.8 per cent of total Canadian households subscribe. Those who do not wish to subscribe or who are beyond the natural limits of the extension of cable television have a statutory right to insist that Canadian broadcasting services be safeguarded.

Cable licensees have legitimately and in conformity with their licence authority exploited imaginatively their opportunities. They have done so when others would not accept the risk nor provide the benefits. However, the ultimate consequences of US signal importation, together with the preponderance of US programming on Canadian stations in peak viewing hours, cannot be obscured or ignored. If Canadians, parliamentarians, provincial governments, broadcasters, and the cable industry are committed to maintaining a system using predominantly Canadian creative and other resources, then these conclusions must be taken into account in the development of new national broadcasting policies.

D. CANADIAN PROGRAMMING: TELEVISION

One of the most striking and potentially controversial findings in the report is the conclusion (see Table 16) that the overall audience share for Canadian programming in prime time of programming on all Canadian and US English-language television networks and stations was approximately 29 per cent in 1976. For French-language networks and stations (see Table 19) the comparable share was approximately 65 per cent. The finding is striking because it means that the share for Canadian programming in 1976 on English-language stations, although it rose to 34 per cent in 1972, was exactly equivalent to the Canadian programming share in 1967. For French-language stations the programming share rose from 59 per cent to about 65 per cent in the same period.

Whether such conclusions are a matter of deepening concern or an indication of some relative achievement depends on further analysis. First, 29 per cent was the audience share for Canadian programming on all English-language stations in 1967 and the percentage was the same in 1976. The audience share, however, for all English-language Canadian stations in 1967 was about 78 per cent dropping to 75 per cent in 1976. Therefore, the Canadian programming share of the total audience share for Canadian stations rose marginally from 37 per cent to 39 per cent. It was obviously not a significant increase but an increase all the same in a broadcasting environment characterized by an increase in the availability of US stations in Canada and US programming on Canadian stations.

Second, undoubtedly the overall audience for Canadian television stations increased significantly in the decade so that the absolute number of Canadians viewing Canadian programs has increased. In relative terms, however, since the viewing share of US stations has increased by four per cent and the viewing of US programs on Canadian stations remained almost constant, the share of US programming clearly and decisively predominates.

Third, the audience share for Canadian programs for the CBC English-language network in the same period declined from about 18 per cent to something slightly less than 13 per cent. This statistical decline will justifiably raise concerns. Even so, however, the audience share for Canadian programming on CBC owned-and-operated English-language stations has increased from 51 per cent in 1967 to 56 per cent and in the private sector the increase is 6 per cent from 25 per cent in 1967. Admittedly, this may be characterized as the "best hypothesis" approach because it is impossible to avoid the conclusion that the CBC audience share overall has seriously declined.

Fourth, the 29 per cent as the Canadian programming share in 1976 is not the same 29 per cent as in 1967. As the report indicates (see Table 15) Canadian news, current affairs, and information had an audience share of 12.5 per cent in 1967 and it has risen appreciably in 1976 to 16.8 per cent. Those are important program categories because they so directly reflect programming responses to important Canadian political, economic, and social conditions. It is in the sports and entertainment category that the audience share was down from 16 per cent to 12 per cent in 1976. The significant increase of Canadian programming in

French-language television stations is almost entirely a result of an increase in the programming category of sports.

Finally, having interpreted the statistics in a favorable context, it is still very difficult to ignore the basic conclusion that Canadian programming only attracts an overall audience share of all receivable stations in English Canada of 29 per cent. It would appear from a general assessment of the statistics in Table 15, given the almost exclusive attraction for Canadians of their own news, current affairs, and information, which is 17 per cent of the audience share, together with the natural attraction of Canadian sporting events like NHL hockey and CFL football, which is on an average about 5 per cent of the audience share, that the Canadian audience share for English-language stations is at its bedrock at 22 per cent. Whether any satisfaction can be gained from a 7 per cent Canadian programming share over and above an absolute minimum is a factor which must be carefully weighed in all considerations of developing national broadcasting policy.

The statistical information also indicates that Canadians primarily view television programming for its entertainment value. What may not have been so clearly substantiated before is the extent to which there is viewing of entertainment programming, and the extent to which the viewing of US entertainment programming, whether distributed by US signals or broadcast by Canadian stations, dominates.

The requirement for entertainment programming has important consequences. First, since there is competition for audiences, it is necessary for the broadcaster to obtain advertising revenue by purchasing the rights to and scheduling the popular US entertainment programs in prime time to meet the competition of the US imported stations and Canadian competitors. The effect is a dramatic increase in the average price paid by Canadian broadcasters for US programming which directly influences programming budgets.

Second, it is almost conceded that Canadian programming cannot compete successfully with the costly US entertainment programs of the drama-action/adventure type. About 85 to 95 per cent of Canadian entertainment programming on the private stations is of the less costly musical variety or games show entertainment format. This difference in quality and attractiveness tends to reinforce the disparity in the viewing of US entertainment shows in prime time. When

offered an equivalent entertainment program (at far higher cost to the domestic broadcaster), Canadians do watch Canadian entertainment shows.*

Third, to take advantage of the Commission's regulation with respect to simultaneous program substitution, there is a clear similarity between the schedule of a US station and the schedule of a Canadian private station in peak viewing hours.**

Finally, there is an absence of Canadian programs in the schedules, especially in the schedules of private English-language television stations, in the peak viewing hours between 8 pm and 10:30 pm weekdays. Canadian programs are more and more being pushed to the edges of prime time. The most recent example is the decision of Global Television to move its 10 pm evening news to 11 pm in competition with all other Canadian news broadcasts in order to show the re-runs of Baretta.

There is a tendency to explain this predominance of US programming in peak viewing hours in two ways. First, it is maintained that broadcasting, financial, and other realities dictate such scheduling and second that Canadian content rules serve as an impediment to more imaginative scheduling. The first conclusion appears to be valid while the second is clearly arguable. It is difficult to imagine that broadcasting licensees, who are entrusted with ensuring the predominance of Canadian programming, could expect to have to meet a lesser requirement than a 50 per cent Canadian content rule in prime time based on an annual calculation. What is debatable is the possibility of redesigning Canadian content rules to encourage with incentives the production of high-quality, Canadian-produced programs while ensuring the predominance of Canadian programming.

* BBM statistics in the week of 27 February to 5 March 1978 indicated that on the CBC English network, René Simard, The Beachcombers, and The King of Kensington ranked 11th, 12th, and 16th with audience ratings of 1.4 million or more. In the same period on CTV, Stars on Ice and Search and Rescue ranked 12th and 17th with audiences in excess of 1.5 million. On the Radio-Canada network, Grand-papa, Du tac au tac and Jamais deux sans toi were ranked 1st, 4th, and 8th with audiences in excess of 1.3 million, and on the TVA network Dominique and Symphonien were ranked 1st and 7th with audiences in excess of 1.2 million.

** The term prime time denotes the period between 6 pm and 12 pm; the term peak viewing hours refers to the period between 8 pm and 10:30 pm.

Compliance by broadcasters with the Broadcasting Act and its regulations is possible by a mechanical, legally acceptable response to minimum regulatory requirements. Licensees have demonstrated on applying for a licence a definite understanding of their overall cultural, social, and broadcasting obligations.

The facts however indicate that in peak viewing hours programming on the private English broadcasting system is predominantly United States programming.* It is evident that most Canadian entertainment programming is not consistently of the same quality as its foreign counterpart and is scheduled at the periphery of peak viewing. There must be renewed determination to produce higher quality Canadian programming which will be watched by Canadian audiences.

It is the Commission's intention to review and explore fully realistic programming commitments by Canadian broadcasters, in the context of a review of the promise of performance of major metropolitan Toronto television stations in the immediate future. This, and subsequent reviews, must ascertain the extent to which Canadian broadcasters are in a financial position to make a higher and more significant contribution to Canadian programming.**

The comparable situation does not however exist with respect to Canadian programming on French-language networks and stations. The Commission's preoccupation is to ensure that certain French-language stations affiliated to the TVA network meet programming commitments.

E. CANADIAN PROGRAMMING: RADIO

There is a significant coverage and choice of both English-language and French-language radio stations in Canada for Canadian audiences. In English-speaking Canada 98 per cent of Canadians have access to at least four Canadian English-language radio stations. Ninety-seven per cent of the population in Québec has access to an equal number of French-language radio stations.

* The Canadian content in peak viewing hours (8 to 10:30 pm) for the CBC television in 1978-79 schedule is 68.5 per cent, while for Radio-Canada the percentage is 71.4 per cent.

** An important public hearing is to be held in Toronto commencing 6 March 1979 to consider this matter.

The audience share for all Canadian English-language radio stations in English-speaking Canada is very high and has remained constant over the decade at about 97 per cent. French-language radio stations in the province of Québec have attracted an audience share of about 75 per cent of the Québec population in the same time period.

There are two very interesting observations that emerge from Tables 23 and 24. First, the audience share for US radio stations in Canada is minimal and insignificant. The concerns that so dominate any discussion of Canadian English-language television are of no relevance in an analysis of the Canadian radio situation. This is a very important distinction. Second, there has been a perceptible shift in audience patterns over the decade from AM to FM. While in 1967 English-language FM radio stations attracted an audience share of approximately 4 per cent, it is now in excess of 15 per cent and increasing. The same comparison is true for French-language FM radio stations which had an audience share in 1977 of 14 per cent, up from about 5 per cent in 1967.

Although there are several foreign syndicated radio programs on Canadian radio stations, to the greatest extent, all the non-musical elements in the radio programming are Canadian. The importance, therefore, of the audience share statistics is not the extent to which such statistics dramatize the percentage of Canadian programming on Canadian stations but rather the attractiveness and appeal of the programming format of the radio station and network. In a highly developed, competitive, radio environment, it is of some considerable satisfaction that in English-speaking Canada the audience share of CBC owned-and-operated stations has increased by 4 per cent which is a 100 per cent increase over 1967. In Québec, Radio-Canada owned-and-operated stations increased their audience share by 1.4 per cent.

Admittedly there was an increase in the number of CBC stations over the period but in comparable terms there were proportionate increases in private stations. It is not a distortion of the statistics, therefore, to conclude that the increased audience share for CBC-Radio-Canada is attributable to the quality and appeal of the radio programming of the public service and that many of these radio programs have proven indispensable for Canadian audiences.

F. CBC-RADIO-CANADA

The statistics illustrate a distinct trend to declining audiences for CBC English-language affiliated and owned-and-operated television stations. There are a number of explanations for the absolute decline in CBC audience shares. The CBC television network, over the decade, has had to maintain its programming services in competition with a proliferation of public, private, and foreign broadcasting services. In addition, the CBC is dependent to a significant extent on affiliates and affiliate arrangements for the distribution of CBC network programming. It is generally admitted that there are some unsatisfactory aspects to affiliate arrangements and most affiliated stations are very susceptible to audience loss due to expanding cable services. In addition the CBC, by statute, is directed to provide programming covering all ranges of interests and tastes in fair proportion and serving the special needs of all geographical regions of Canada. These requirements dictate a diffusion of programming effort and a constant necessity to react to demands for variety and balance in programming.

The first factor is compelling. The CBC television network as a Canadian programming service was the first Canadian television service to be distributed in all metropolitan areas of Canada. The introduction, therefore, of any additional Canadian or US signal had to fragment the original CBC audience share. The Sudbury and Timmins area is typical of a region in which no US signals were received and the CBC affiliates were the only original service. Initially the CBC service had 100 per cent of the audience but when the CTV service was established, the audience was shared in a ratio of approximately 55 per cent CBC, 45 per cent CTV. In 1977 with the introduction via cable of a single Canadian distant signal (Global) and the introduction of a single US signal (CBS) the cable audience shares were in the following proportion: 29.8 per cent CBC; 36.6 per cent CTV; 14.5 per cent Global; 14.3 per cent CBS; and 4 per cent other.

It is therefore a natural dynamic of the introduction of additional broadcasting signals that the audience share subdivides whether from the introduction of a Canadian or a US signal. The audience share is far less a product of the commanding attraction of the quality of programming as much as of the simple availability of additional programming, especially if it is US programming of an entertainment nature.

As indicated, it is CBC-Radio-Canada's specific mandate to be a balanced program service for all types of audiences, in fair proportion throughout all geographical regions of Canada, in both official languages. If the fulfillment of this mandate prescription is conscientiously sought, as well as meeting the Act's requirement that the programming be predominantly Canadian in content and character, then it must be understood that mass audience appeal is a superficial criterion by which to assess the value of CBC-Radio-Canada's programming service.

As the Commission noted in its March 1974 decision on the renewal of CBC-Radio-Canada television and radio licences: "the Canadian television audience should not be considered as an agglomeration of 20 million more or less accessible revenue-producing consumers, but rather as an active community of people, with real and varying communication needs."* In this context real communication may indeed be the opposite of mass diffusion of programming. It is the opinion of the Commission that the range of viewers reached is much more relevant and important than the numerical size of any particular audience.

The important conclusion to retain, which so dominated the Commission's 1974 decision, is that "A Canadian program of quality, which initially attracts a relatively limited audience, could perhaps, by developing and sustaining its audience, represent a far richer potential and be of greater cultural importance to Canadians than a foreign produced series which, thanks to five years of continuous, carefully orchestrated, multi-media promotion, boasts a regular audience of over three million."**

It must therefore be constantly remembered that audiences of 500,000 or one million Canadians for significant Canadian information, dramatic, or entertainment programs, may indeed be a vigorous demonstration of the ultimate importance of a publicly supported broadcasting system.***

* "Radio Frequencies are Public Property," CRTC Decision 74-70, 31 March 1974, p.11.

** *ibid.*, p.13.

*** There are many Canadian programs which have audience ratings in excess of 500,000, for example, see the first footnote on p.102.

In the emerging broadcasting situation in which there is a clamour for new and competing broadcasting services of foreign and domestic origin, the publicly supported element of the broadcasting system is indispensable to Canadians as never before. As this report indicates, there is absolutely nothing to be gained by protesting the clear reality of the importation of US programming, whether through cable or by Canadian stations. Canadians expect that programming and almost 50 per cent of Canadian households could in 1967 receive it over-the-air. It is available to a growing majority of Canadians. CBC-Radio-Canada for good reasons carries some of the best US entertainment programming and the Commission has endorsed that programming exposure.* The Commission and the publicly supported broadcasting agencies will not receive the gratitude of Canadians for any attempt to build artificial barriers to the importation of US and other foreign programming.

One dominant conclusion remains. The CBC English-language stations, faced with increased competition from US stations, have not withstood the competition as well as private stations and by quite a margin. A principal factor may well be the increased use of US entertainment programming by private stations, especially in prime time, to counteract the US competition supported by simultaneous substitution. It is particularly striking, however, that in the category of news, where the US competition is not a factor, the CBC audience share has correspondingly declined. It must be recognized, therefore, that the explanations provided in this report for the absolute decline in CBC television audience shares are only a partial explanation.

If the CBC is to remain indispensable to Canadians, new and imaginative steps must be taken immediately to adapt CBC programming policies to the contemporary broadcasting environment. It is extremely doubtful that in that context more money alone is the answer. The Commission will address itself more directly to this overriding question in its forthcoming decision on the renewal of CBC radio and television network licences.

* It is possible that between 29 and 35 per cent of Canadian households are exclusively dependent on Canadian off-air television services. This figure is arrived at by adding together the percentage of non-subscribing households passed by cable and dependent on Canadian signals, and the percentage of households beyond the natural limits of cable extension. For these households, CBC-Radio-Canada programming must remain varied and balanced to provide entertainment programming of the best quality regardless of origin.

APPENDIX I

ANALYSIS OF TELEVISION AUDIENCE DATA: METHODOLOGY

Data sources: BBM* Surveys, 6 pm to midnight:

- a. 1967, 30 October to 12 November;
- b. 1976, 25 to 31 October, and
8 to 21 November.

The audience for regularly scheduled programs, normally scheduled every week, was averaged for the weeks surveyed.

Special programs, seldom scheduled in successive weeks, were excluded so as to arrive at audience shares for a typical week; this was possible because data for more than one week were available.

Viewing time was measured in audience hours. The viewing time for a particular station is the total number of hours or minutes spent by Canadians anywhere in the country watching the programs provided by that station, whether received off-air or by cable. The figures do not directly indicate the amount of Canadian programming available, but rather the popular appeal of Canadian content where it is available.

* BBM: BBM Bureau of Measurement, Toronto, is an independent survey agency.

APPENDIX II

ANALYSIS OF RADIO AUDIENCE DATA: METHODOLOGY

Data sources: BBM Surveys, Broadcasting Day:

- a. November 1967
- b. November 1977.

Figures for the numbers of stations include all originating stations for which any listening hours were reported. "Percentage reach" is the percentage of the population, in the market, that listened at least once during the period of one week.

To determine the distribution of radio stations in terms of the percentage of the population that has access to them, the following rules were used:

1. English-language AM: If the percentage reach was 5 per cent or more, the station was treated as fully available in the market; otherwise, it was considered unavailable. The reach of most English-language AM stations is generally much higher than 5 per cent.
2. English-language FM: FM stations generally have a smaller reach. In this analysis, a cut-off of 1 per cent was used.
3. French-language AM: The reach of French-language AM stations is generally much higher than 5 per cent in Québec but extremely low elsewhere in Canada. The cut-offs used were 5 per cent for Québec and 1 per cent for English-speaking Canada.
4. All other stations, including French-language FM and US stations: a cut-off of 1 per cent was used.

In the BBM figures, any reach between 0.5 and 1 per cent is reported as 1 per cent; reach below 0.5 per cent is not recorded.

It would not be practicable to analyze audience shares by type of program, as it is for television; they are calculated instead in relation to types of station (see Appendix III). Audience shares are measured from actual recorded listening hours.

APPENDIX III

CATEGORIES OF RADIO STATIONS

Radio stations are categorized according to the type of music predominantly broadcast, but some, such as those of the CBC, have to be set apart. The following categories were used in this analysis:

1. Contemporary M.O.R. (Middle-of-the-Road)

More than 30% general popular music
More than 30% rock or country music
Example: CFRA Ottawa

2. Contemporary

More than 30% general popular music
More than 50% rock music
More hits than non-hits
Example: CKLW Windsor

3. Progressive A.O.R. (Album-oriented Rock)

More than 30% general popular music
More than 50% rock music
More non-hits than hits
Example: CHOM-FM Montréal

4. Country

More than 30% general popular music
More than 50% country music
Example: CFAC Calgary

5. M.O.R.

More than 30% general popular music
Less than 30% rock or country music
Less than 20% serious music
More vocal than instrumental selections
Example: CFRB Toronto

APPENDIX III

6. Easy Listening

More than 30% general popular music
Less than 30% rock or country music
Less than 20% serious music
More instrumental than vocal selections
Example: CHQM Vancouver

7. Traditional M.O.R.

More than 30% general popular music
Less than 30% rock or country music
More than 20% serious music
Example: CHEC-FM Lethbridge

8. Information and Talk

Example: CKO Montréal

9. CBC-Radio-Canada

Radio stations owned-and-operated by CBC-Radio-Canada

10. Block

Discrete blocks of specific programs generally
consisting of only one category of material.
Example: CFNB Fredericton

11. Other.

APPENDIX IV

NETWORK PROGRAMS BY CATEGORY AND COUNTRY OF ORIGIN,
1967 AND 1977

(CBC, RADIO-CANADA, CTV, and TVA)

TABLE 1

CBC NETWORK PROGRAMS 1967

6 pm-12 pm

Category	Canadian		Foreign	
	Title	Length (hrs)	Title	Length (hrs)
1. News	CBC National News	1.75		
2. Current affairs	The Way It Is	1.00		
	The Public Eye	1.00		
	Telescope	0.50		
		<u>2.50</u>		
3. Information				
4. Sports	Hockey Night in Canada	2.00		
5. Entertainment	Flash Back	0.50	Disney World	1.00
	Show of the Week	1.00	Green Acres	0.50
	Front Page Challenge	0.50	Ed Sullivan	1.00
	Don Messer's Jubilee	0.50	Bonanza	1.00
	Hatch's Hill	1.00	Red Skelton	1.00
	Festival	1.50	Mothers in Law	0.50
	Tommy Hunter	0.50	Mission Impossible	1.00
	Sounds 68	0.25	20 Million Questions	0.50
	In Person	0.50	Accidental Family	0.50
		<u>6.25</u>	Hogan's Heroes	0.50
			Man From Uncle	1.00
			Dragnet	0.50
			Get Smart	0.50
			Friday Night Movie	2.00
			Beverley Hillbillies	0.50
			The High Chaparral	1.00
			Dundee and Culhane	1.00
				<u>14.00</u>
6. Other	The True North	0.50		
	This Land of Ours	0.50		
		<u>1.00</u>		
7. Total hours 27.5		13.50		14.00

TABLE 2

CBC NETWORK PROGRAMS 1976

6 pm-12 pm

Category	Canadian		Foreign	
	Title	Length (hrs)	Title	Length (hrs)
1. News	CBC Saturday News	0.50		
	1. National News	1.75		
	2. Stay Tuned	0.50		
		<u>2.75</u>		
2. Current affairs	Ombudsman	0.50		
	CBC News Magazine	0.50		
	Man Alive	0.50		
	fifth estate	1.00		
	New Wave	0.50		
	One Canadian	0.50		
	Watson Report	0.50		
	Best of LaPierre	0.50		
		<u>4.50</u>		
3. Information	Market Place	0.50		
4. Sports	Hockey Night in Canada	2.50		
5. Entertainment	Beachcombers	0.50	Disney	1.00
	Superspecial	1.00	Tony Randall	0.50
	Front Page Challenge	0.50	Side Street	1.00
	Here Comes the Wolfman	0.50	Rhoda	0.50
	King of Kensington	0.50	Phyllis	0.50
	Bluff	0.50	All in the Family	0.50
	Music Canada	1.50	Happy Days	0.50
	Royal Suite	0.50	M*A*S*H	0.50
	Teleplay	0.50	Barney Miller	0.50
	Diane Stapley	0.50	Welcome Back Kotter	0.50
	Tommy Hunter	1.00	Carol Burnett	1.00
		<u>7.50</u>	Mary Tyler Moore	0.50
			Chico and the Man	0.50
				<u>8.00</u>
6. Other				
7. Total hours	27.75	17.75		8.00

TABLE 3

CTV NETWORK PROGRAMS 1967

6 pm-12 pm

Category	Canadian		Foreign	
	Title	Length (hrs)	Title	Length (hrs)
1. News	CTV National News	1.75		
2. Current affairs	W5	1.00		
	Sports Hot Seat	0.50		
		<u>1.50</u>		
3. Information				
4. Sports	Hockey Night	2.00		
5. Entertainment	Country Music Hall	0.50	The Monkees	0.50
	Pig 'n' Whistle	0.50	The FBI	1.00
	Canada 101 Challenge	0.50	I Dream of Jeannie	0.50
	It's Happening	0.50	Smothers Brothers	1.00
	Cross Fire	0.25	Second 100 Years	0.50
		<u>2.25</u>	Lucy	0.50
			Bewitched	0.50
			Family Affair	0.50
			I Spy	1.00
			Batman	0.50
			Jerry Lewis	1.00
			Ironside	1.00
			Flying Nun	0.50
			Star Trek	1.00
			Dean Martin	1.00
			Mannix	1.00
			To See the Wizard	1.00
			Friday Night Movie	2.00
			Big Valley	1.00
			Jackie Gleason	1.00
			Academy Performance	2.00
			Garisson's Gorillas	1.00
			Invaders	1.00
			The Prisoner	1.00
				<u>22.00</u>
6. Other				
7. Total hours 29.5		7.50		22.00

TABLE 4

CTV NETWORK PROGRAMS 1976

6 pm-12 pm

Category	Canadian		Foreign	
	Title	Length (hrs)	Title	Length (hrs)
1. News	CTV National News	2.33		
2. Current affairs	W5	1.00		
	Sports Hot Seat	0.50		
		<u>1.50</u>		
3. Information				
4. Sports				
5. Entertainment	Funny Farm	0.50	\$6,000,000 Man	1.00
	Pig 'n' Whistle	0.50	Sonny and Cher	1.00
	Bobby Vinton	0.50	Kojak	1.00
	Stars on Ice	0.50	Good Times	0.50
	Julie	0.50	Academy Performance	3.00
	Amazing Kreskin	0.50	The Waltons	1.00
	Grand Old Country	0.50	One Day At A Time	0.50
	David Steinberg	0.50	Streets of	
	Headline Hunters	0.50	San Francisco	1.00
		<u>4.50</u>	Bionic Woman	1.00
			The Practice	0.50
			Switch	1.00
			The Jeffersons	0.50
			Sanford and Son	0.50
			Gemini Man	1.00
			Nancy	0.50
			Delvecchio	1.00
			Holmes and Yoyo	0.50
			Donny and Marie	1.00
			The Rockford Files	1.00
			Serpico	1.00
			Emergency	1.00
				<u>19.50</u>
6. Other				
7. Total hours 27.83		8.33		19.50

TABLE 5

RADIO-CANADA NETWORK PROGRAMS 1967

6 pm-12 pm

Category	Canadian		Foreign	
	Title	Length (hrs)	Title	Length (hrs)
1. News	Téléjournal	4.24		
2. Current affairs	Vivre en ce pays	.50	Envers des hommes	.50
	Sports dimanche	.25		
	Aujourd'hui	5.00		
	Sel de la semaine	1.00		
	Tirez au clair	1.00		
	Sports	.25		
		<u>8.00</u>		
3. Information	Canada express	.50		
4. Sports	Heure des quilles	.50		
	Soirée du hockey	4.00		
		<u>4.50</u>		
5. Entertainment	Beaux dimanches	2.00	Walt Disney	1.00
	Jeunesse oblige	1.25		
	Belles histoires	1.00	Jinny	.50
	Rue des pignons	.50	Le prisonnier	1.00
	Moi et l'autre	.50	Les Globe-trotteurs	.50
	Tous pour un	.50	Mission impossible	1.00
	Caméra '67	.50	Sauve qui peut	.50
	A guichet fermé	.50	Chevaliers du ciel	.50
	D'Iberville	.50	Cher oncle Bill	.50
	Les cailloux	.50	Espions et brigands	1.00
	A la seconde	.50	Perdus dans l'espace	1.00
	Age tendre	1.00	Commando du désert	.50
	Les couche-tards	.50	Cinéma	5.00
		<u>9.75</u>		<u>13.00</u>
6. Other	Atomes et galaxies	.50	D'hier à demain	.50
	Langue vivante	.50		
		<u>1.00</u>		
7. Total hours 42.00		28.00		14.00

TABLE 6

RADIO-CANADA NETWORK PROGRAMS 1976

6 pm-12 pm

Category	Canadian		Foreign	
	Title	Length (hrs)	Title	Length (hrs)
1. News	Téléjournal	3.50		
	Ce soir	5.00		
		8.50		
2. Current affairs	Télescope	.25	Partout	.25
	Sports dimanche	.25		
	Le 60	1.00		
	Le pour ou le contre	1.00		
	Sports	.25		
		2.75		
3. Information	Consommateurs avertis	.50		
4. Sports	Soirée du hockey	2.50		
5. Entertainment	15 ans après	.50	Déclic	.50
	Beaux dimanches	3.00	Evasions célèbres	1.00
	La petite semaine	.50	Walt Disney	1.00
	Y'a pas de problème	.50	Daniel Boone	1.00
	Avec le temps	.50	Hors série	1.00
	Grand-papa	.50	Harold Lloyd	.50
	Velettes en direct	.50	Brigade spéciale	1.00
	Rue des pignons	.50	Pierrafeu	.50
	Du tac au tac	.50	Marcus Welby	1.00
	Le travail à la chaîne	.50	Pourquoi	.50
	Appellez-moi Lise	1.00	Cosmos 1999	1.00
	Scénario	.50	Cinéma	6.50
		9.00		15.50
6. Other	Vieillir et vivre	.50		
	Rencontres	.50		
	Propos et confidences	.50		
	Reflets d'un pays	1.00		
	Science réalité	.50		
		3.00		
7. Total hours	42.00	26.25		15.75

TABLE 7

TVA (CFMT) PROGRAMS 1967

6 pm-12 pm

Category	Canadian		Foreign	
	Title	Length (hrs)	Title	Length (hrs)
1. News	Dernière heure	3.00		
2. Current Affairs	La ronde des sports	1.75		
	Franc parler	.75		
		<u>2.50</u>		
3. Information				
4. Sports				
5. Entertainment	Caisse-Boni	.50	Le Virginien	1.50
	Music-Hall des jeunes	.50	Sauve qui peut	1.00
	Chansons à vendre	.50	Au-delà du réel	1.00
	Histoire d'une étoile	.50	Sorcière bien aimé	.50
	Au bout du monde	.25	Cinéma	10.00
	Télémetro	6.25	L'homme à la valise	1.00
	Lecoq et fils	.50	Peter Gunn	.50
	Formi formidable	.50	Le fugitif	1.00
	Les trois cloches	.50	La grande vallée	1.00
	Venez donc chez-moi	.25	Martien favori	.50
	Cré Basile	.50	Arpents verts	.50
	Claude Blanchard	.50		<u>18.50</u>
	Plaza Fortune	.75		
	Réal Giguère	1.00		
	Deux pianos	.25		
	Un peu beaucoup	.50		
	Secret bien gardé	.50		
	Père Gédéon	.25		
	Ecole du bonheur	.25		
	Adam ou Eve	.50		
	M. Banco	.50		
	Toute la ville en parle	.25		
	Terre des jeunes	1.00		
	Jeunesse d'aujourd'hui	1.00		
		<u>18.00</u>		
6. Other				
7. Total hours 42.00		18.00		18.50

TABLE 8

TVA (CFMT) PROGRAMS 1976

6 pm-12 pm

Category	Canadian		Foreign	
	Title	Length (hrs)	Title	Length (hrs)
1. News	Nouvelles TVA	3.50		
	Le dix vous informe	2.50		
	La couleur du temps	1.50		
	Gros plan sur l'actualité	.50		
		<u>8.00</u>		
2. Current affairs	Les gens qui font l'événement	1.00		
	Regards sur le monde	.50		
	Qu'en pense le Québec	.50		
	Sports magazine	.50		
		<u>2.50</u>		
3. Information				
4. Sports				
5. Entertainment	L'école du music-hall	.50	Petite maison dans la prairie	1.00
	Showbizz	1.00	Les incorruptibles	.75
	Parle parle jase jase	5.00	Auto-patrouille	.50
	Les Bergers	.50	Kojak	1.00
	Cabaret	.50	Le fugitif	.75
	Symphorien	.50	Hawaii 5-0	1.00
	Parlez-moi d'humour	.50	Ca prend un voleur	.75
	José Todaro	.50	Mannix	.75
	Chère Isabelle	.50	Médecin d'aujourd'hui	1.00
	A la canadienne	.50	Les protecteurs	.50
	L'union fait la farce	.50	Cinéma	<u>10.00</u>
	Montréal en parle	.50		<u>18.00</u>
	Nouveau talent	.50		
	Qui dit vrai	.50		
	Corne d'abondance	.25		
	Point d'orgue	.25		
	Discotourne	1.00		
		<u>13.50</u>		
6. Other				
7. Total hours	42.00		24.00	

